Technical Report 1356

Enabling Rapid Integration of Combined Arms Teams into a Brigade Combat Team Organizational Structure

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14. ABSTRACT

The purpose of the research is to identify the factors that facilitate and hinder specialized team integration into Brigade Combat Teams (BCTs)/Conventional Force (CF) units. Using the Battlefield Surveillance Brigades (BfSB) Multi-Functional Team (MFT) as the exemplar, a set of integration tools for ensuring the rapid integration of MFTs into the supported maneuver unit's organization and mission set were developed and evaluated. The research began with a review of relevant publications (doctrine and academic literature) to identify factors that facilitate and hinder specialized team integration. To expand and validate the literature review results, interviews and focus groups were conducted with Army subject matter experts (SMEs) who had direct experience with small team integration with conventional forces (CF) to better understand the factors influencing effective integration as well as to better understand current Army integration training and the preparation of Soldiers on these specialized teams. Following the data collection, a set of tools to support the rapid integration of MFTs into BCTs were developed, and a formative evaluation was conducted to assess the effectiveness of the tools.

15. SUBJECT TERMS
Brigade Combat Teams, Specialized Team Integration, Multi-functional Team, Military Intelligence, Battlefield Surveillance Brigade

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ENABLING RAPID INTEGRATION OF COMBINED ARMS TEAMS INTO A BRIGADE COMBAT TEAM ORGANIZATIONAL STRUCTURE

EXECUTIVE SUMMARY

Research Requirement:

There is a recurring and continuous need for effective integration of supporting specialized teams with Army Conventional Force (CF) units (U.S. Department of the Defense, 2010). An example of a highly specialized team currently integrated with the Brigade Combat Team (BCT) is the Multi-Functional Team (MFT). Consequently, the research sought to identify the factors that facilitate and hinder specialized team integration into a BCT, using the MFT as its example and, subsequently, to develop a set of integration tools for ensuring the rapid integration of MFTs into the supported maneuver unit's organization and mission set.

Procedure:

The research began with a review of relevant publications (doctrine and academic literature) to identify factors that facilitate and hinder specialized team integration. To expand and validate the literature review results, interviews and focus groups were conducted with Army subject matter experts (SMEs), who had direct experience integrating specialized teams. The purpose of these interviews was to better understand the factors influencing effective integration and to better understand current Army integration training and the preparation of Soldiers on these specialized teams. Following the data collection, a set of tools was developed to enable more effective rapid integration of MFTs (specifically) and potentially other specialized team types into a maneuver unit's organization. A formative evaluation was conducted to evaluate the effectiveness and utility of the tools leading to minor redesign and updates before delivery to the research sponsor.

Findings:

Two integration tools were developed: an MFT Quad Chart and a Smart Card. The MFT Quad Chart is designed to establish the conditions for successful integration by providing the BCT senior leadership a brief overview of MFT capabilities, requirements and recommended courses of action (COA) for MFT employment. This tool is used and aligned within a current operational context and BCT/CF mission. The target audience for the Quad Chart is the BCT Command Group and is based on the assumption that there may be limited time to deliver a full MFT capabilities brief to the Commander. The Quad Chart enables the specialized team to establish trust with the organization by providing key MFT capabilities in a condensed format. As required, the MFT leader can expand the Quad Chart into a full MFT operational capabilities briefing to further inform key BCT staff members (e.g., S2/S3/S2X) on the complete skill set the MFT possesses. The Quad Chart format was selected because it is familiar to senior members of the BCT Command elements and staff.

The Smart Card is scalable based on the target audience and more specifically designed to inform and update the BCT/CF commanders and staff on the general capabilities and

requirements of the MFT. The results of the research indicate the card should be introduced during pre-deployment, home station, or training opportunities. The card may be used electronically or portions can be printed out and distributed in hard copy.

Results of the formative evaluation indicated that both tools were considered valuable resources during a Combat Training Center (CTC) unit rotation that included a BCT and the integration of its supporting Military Intelligence assets and specialized teams.

Utilization and Dissemination of Findings:

The full MFT Quad Chart and Smart Card were designed to be tailored and scaled by the MFT Team Leader and Platoon Sergeant during the integration process. The tools can be used internally by the MFT to provide a quick reference for its team members. The full tools provide a menu of options and supporting information slides that allow the amount of tool detail to vary by the audience and operational situation. When used in unison, the complementary tools allow the MFT leader to clearly convey the team's capabilities and requirements while also describing how the MFT enhances the supported unit's ability to achieve its mission. The tools may be used electronically or portions can be printed out and distributed in hard copy. Currently, select Battlefield Surveillance Brigade (BfSB) companies, the training capabilities manage (TCM) Recon, and key senior leaders in the military intelligence are evaluating the two products.

ENABLING RAPID INTEGRATION OF COMBINED ARMS TEAMS INTO A BRIGADE COMBAT TEAM ORGANIZATIONAL STRUCTURE

CONTENTS

APPENDICES

LIST OF TABLES

ENABLING RAPID INTEGRATION OF COMBINED ARMS TEAMS
INTO A BRIGADE COMBAT TEAM ORGANIZATIONAL STRUCTURE

There is a recurring and continuous need for effective integration of supporting specialized teams with Army Conventional Force (CF) units U.S. Department of the Defense (DOD), 2010. Successful counterinsurgency operations (COIN) in Iraq and Afghanistan required the integration of Military Intelligence (MI) assets to identify and locate complex covert cells and individuals of interest, Special Operations (SOF) teams to both counter and organize indigenous forces, and governance specialties to rebuild infrastructure and retrain local nationals to create a credible functioning governmental presence. The Army's recent doctrinal and practical transition to Unified Land Operations (ULO) emphasizes the need for specialized team integration by indicating that Brigade Combat Teams (BCTs) must have the ability to integrate and effectively maximize specialized teams in Combined Arms Maneuver and Wide Area Security missions that encompass offensive, defensive, and stability and support operations simultaneously (DOD, 2010).

An example of a highly specialized team currently integrated with the BCT is the MI Multi-Functional Team (MFT). MFTs are groups made up of multidisciplinary intelligence collection assets that collect, exploit, and analyze intelligence. They support Decisive Action operations by providing time-sensitive detection, tracking and location of key targets Department of the Army (DA), 2013. MFTs bring these capabilities "to the fight" by forming a collaborative team with a spectrum of MI capabilities (i.e., signal intelligence, human intelligence, counterinsurgency, crypto logic linguistics) and focusing the combined capabilities on specific intelligence needs. Designed to provide tactical-level units with highly sophisticated and diverse intelligence collection and exploitation capabilities, MFTs furnish BCT Commanders and their staff direct and immediate access to important battlefield intelligence. Consequently, the speed and precision with which a BCT can act is potentially improved with the effective utilization of an MFT. Questions have been raised, however, about whether or not MFT capabilities are maximized and employed effectively when they are attached to a BCT (DA, 2009). Consequently, this research seeks to identify the factors that facilitate and hinder specialized team integration into a BCT, using the MFT as an example.

LITERATURE REVIEW

We begin with a comprehensive look at those factors identified in doctrine and the literature that are thought to facilitate and hinder specialized team integration. Each identified construct includes a brief overview definition and an explanation of its relevance to specialized team integration research, followed by a summary of the research findings, including enabling and inhibiting factors for integration, and suggested strategies for facilitating integration. In some cases, the literature reviewed for a given topic did not specifically address inhibiting factors, so inhibiting factors were omitted from a few of the topic areas.

Review of Relevant Factors

The review of the literature and doctrine identified 14 factors which are organized into four categories: (1) Development/integration of people, teams and organizations; (2) Change and adaptation; (3) Culture and climate; and (4) Integration in military organizations.

Development/Integration of People, Teams, and Organizations

Onboarding and socialization. Onboarding and socialization are highly interrelated topics. Onboarding has been defined as "the mechanism through which new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational members and insiders" (Bauer & Erdogan, 2011). Socialization has been defined as "the process whereby an organization teaches an individual the knowledge and skills necessary to assume his or her organizational role" (Van Maanen & Schein, 1979). Due to the overlap between these constructs, some researchers have suggested that the two terms are interchangeable (Begel & Hemphill, 2011); thus, these two domains are reviewed together. Although they are focused on the integration of an individual, the principles of individual onboarding and socialization are likely generalizable to teams.

Enabling factors. A variety of socialization tactics exist. Saks, Uggerslev, and Fassina (2007) organized socialization tactics into six categories: collective, formal, sequential, fixed, serial, and investiture. Their research found that all six categories of tactics helped with adjustment and improved organizational outcomes. Similarly, Bauer, Bodner, Erdogan, Truxillo, and Tucker (2007) found that information seeking and socialization tactics can increase role clarity and social acceptance. Informal socialization helps to facilitate understanding of the organizational politics, goals and values, as well as the development of cohesion and trust in the team (Atzori, Lombardi, Franco, Battistelli, & Zaniboni, 2008). Employees who possess high proactivity and high self-monitoring are more likely to engage in effective onboarding behaviors (Begel & Hemphill, 2011).

Suggested strategies. Leadership support is particularly important when onboarding new members to the organization (Atzori et al., 2008). The leader should actively promote communication among all members to facilitate the adjustment to new practices. Team socialization should be encouraged, as frequent interactions among team members have a beneficial effect on the effectiveness and pace of onboarding in teams (Begel & Hemphill, 2011). Additionally, informal tactics such as general socialization tend to be more helpful than formalized socialization practices (Atzori et al., 2008). Opportunities for socialization and networking should be provided before and after entry into the organization (Saks et al., 2007). Additionally, it is beneficial to provide a trusted insider to offer guidance and feedback to the newcomer (Bauer et al., 2007; Jones, 1986).

Information seeking should be facilitated by defining what's required of the job, what actions are needed to be successful, and how employees relate/connect with others in the organization (Bauer et al., 2007). Communications should include affirming the identity of the newcomer and illustrating how he or she fits into the organization (Saks et al., 2007). In Moreland and Levine's (1982) five-stage model of socialization, both the group and the

newcomer engage in socialization processes, termed "monitoring, " which enables them to compare their expectations with the behaviors they observe during the initial forming stages of the new group (Levine & Moreland, 1991; Moreland & Levine, 1982). Monitoring helps to make cultural gaps and differences in behavioral norms explicit. Although certain stages of group development can be challenging as these differences are brought to the surface, they can be subsequently resolved as members work together to effectively address these differences and come to agreement on important aspects of the group's functioning. Once the team has worked through these issues, the performing stage of regular group functioning can begin.

The use of training is also a crucial component of socialization. Clear stages for training should be provided, including formal training before integration occurs (Bauer et al., 2007; Jones, 1986). Such training helps to reduce newcomers' uncertainty about which tasks they should be able to perform at job entry and which tasks they should be able to learn once on the job. In addition, training prior to integration allows newcomers to increase their efficacy before their new roles begin.

Swift trust. The Army Doctrine and Training Publication (ADRP) 6-0 (2012c), Mission Command, defines mutual trust as a "shared confidence among commanders, subordinates, and partners" (p.2-1). While building cohesive teams through mutual trust is a key principle of mission command, development of trust is typically a time-consuming process (ADRP 6-0, 2012c). Swift trust considers how a level of trust can be developed under stricter time constraints and is "a unique form of collective perception allowing for capable managing of issues of vulnerability, uncertainty, risk, and expectations" (Meyerson, Weick, & Kramer, 1996, p. 167). Although swift trust tends to focus on cognitive factors rather than affective ones, there is still an affective component of swift trust (Hyllengren, Larsson, Fors, Sjoberg, Eid, & Kjellevold Olsen, 2011). Literature on swift trust review considers the process of rapidly establishing trust within teams, a crucial component needed for successful rapid integration.

Enabling factors. Relationship-oriented factors relating to swift trust include employees' knowledge of their leaders, as well as leader behaviors involving interactions with others such as, role modeling, being supportive, and being a good organizer and manager (Hyllengren et al., 2011). Establishing and communicating clear roles, as well as developing positive, early impressions of perceived trustworthiness and perceived follow through also helps to develop swift trust (Zolin, 2002). Indeed, it is beneficial to facilitate perceptions of perceived ability, benevolence, and integrity among team members (Zakaria & Yusof, 2011). Establishing a common identity among team members helps to increase initial levels of trust allowing for improved performance during later stages of mission execution (Adams, Waldherr, & Sartori, 2002). Strategic similarity may facilitate transfer of knowledge, so it is beneficial to focus on higher level, shared strategies between team members (Gavrieli & Scott, 2005). Finally, it is helpful to use reciprocal exchange, rather than negotiated exchange, to enhance feelings of trust and affective commitment (Gavrieli & Scott, 2005). In other words, trust is more likely to be enhanced when team members make individual choices and reciprocate the acts of others, in comparison to negotiated decision making that involves a joint decision. Personal characteristics that relate to swift trust include emotional stability and energy, experience and competence, and social skills including listening and communication skills (Hyllengren et al., 2011).

Inhibiting factors. Different cultural values can inhibit communication and therefore the development of swift trust (Zakaria & Yusof, 2011). The lack of a personal connection inhibits the development of swift trust (Zolin, 2002). People are less likely to initiate or accept the flow of knowledge when perceived to be unreliable, not trustworthy, or not knowledgeable (Gavrieli & Scott, 2005).

Suggested strategies. It is important to help the leader become aware of his or her impact, as leaders can easily facilitate or hinder swift trust based on their interaction style (Hyllengren et al., 2011). The use of relationship-building exercises can help team members gain knowledge of one another and build trust (Zakaria & Yusof, 2011). Quality of information is much more important than quantity; thus, leaders should enhance the quality of information they give (Zolin, 2002). Finally, leaders should also encourage a culture of openness and establish clear roles among team members (Zolin, 2002).

Swift/Rapid teams. Within the literature, several types of teams have been identified that involve the rapid development of a team for a specific purpose (e.g., a team that forms quickly to complete a one-time project). Although these teams are labeled by several different names, such as swift starting action teams, extreme action teams, instant teams, and rapid teams, they share the same core characteristics. As such, the review of this literature is combined and referred to as a rapid team whereby two or more individuals form a team quickly, due to either environmental demands or the need for a team of people with specific expertise. The team is defined by well-trained strangers who need to perform well immediately and who face high stakes (McKinney, Barker, Davis, & Smith, 2005). This topic review considers how to rapidly prepare an effective team, including factors such as building cohesion, clarifying roles and responsibilities, and establishing a shared understanding of goals.

Enabling factors. The team and organization culture needs to value communication, so that team members are open, direct, honest, and able to express vulnerability. Additionally, distinct and varied communication interactions are an enabling factor (e.g., pattern of signaling and responding, encouraging everyone to speak up, providing feedback; McKinney et al., 2005). In one study of rapid teams, the expression of the value of communication preceded effective teamwork and led to more effective task communication and better performance (McKinney, Barker, Davis, & Smith, 2004). Constant communication through both formal and informal channels is needed (Seijts & Gandz, 2009).

Effective delegation within rapid teams is important. Leaders should promote effective delegation techniques rather than simply give orders (Seijts & Gandz, 2009). Klein, Ziegert, Knight, and Xiao (2006) found that dynamic delegation enhances rapid teams' abilities to perform reliably while also building their novice team members' skills. Dynamic delegation involves the rapid and repeated delegation of roles in response to changing demands. For dynamic delegation to be effective there must be coordination and awareness of structures and processes among team members (Klein et al., 2006).

Similarly, good team leaders are needed to organize and manage the team and task appropriately, to build confidence in team members, and to communicate high standards of performance. The organizational culture needs to support teamwork as a complement to

individual performance, so that team outcomes are emphasized over individual outcomes, team members support each other, there is a focus on team objectives, and input is sought from all members. Norms should provide a clear guide for action, including how to share information, set priorities, and handle contingencies. Psychological safety is needed for members to feel comfortable speaking up. Time for reflection on experiences should be provided to facilitate learning from mistakes (Seijts & Gandz, 2009).

Because rapid teams need to work together immediately, trust is particularly important so that team members feel they can count on one another to complete their jobs. While social cohesion may be slower to develop, task cohesion is important in rapid teams. Due to the rapid establishment of these teams, it is particularly important to clarify roles and responsibilities among team members, as well as to establish a shared understanding of goals and expectations.

The required skills for successful rapid team building include; the ability to express the value of communication, to signal and reciprocate accurately, to assess an interaction's success, and to choose among interactions to conduct a communication act. Another important characteristic includes communication awareness, which involves the ability to understand one's own responsibility in the team's communication process (McKinney et al., 2005).

Suggested strategies. The organization should espouse a culture that values openness of communication, as well as implement more formal strategies to improve communication, including targeted training (McKinney et al., 2005). Leaders should encourage the expression of the value of communication and openness among all team members and define roles for interactions (McKinney et al., 2004).

Seijts and Gandz (2009) suggest that the organization should provide general training on how to build teamwork that is broadly applicable across teams, with information on processes such as how to transfer information, solve problems, make decisions, and maintain situational awareness. Additionally, the organization should work to develop leadership skills that encourage teamwork and communication among employees, establish a team learning culture, and establish norms for behavior (Seijts & Gandz, 2009).

Cross-functional Teams. Cross-functional teams are composed of members from various functional units who possess specialized knowledge and skills related to a specific project (Ghobadi, & D'Ambra, 2012). Cross-functional teams involve members with diverse functional backgrounds; however, the inherent diversity of these teams poses a number of challenges to their effectiveness (Webber, 2002). The review on cross-functional teams considers teams that integrate members with different backgrounds, similar to MFTs. Additionally, these cross-functional teams are designed for a specific purpose, typically formed rapidly, and expected to quickly take action.

Enabling factors. A survey of managers about their experiences in cross-functional teams indicates that teams are more likely to share quality information when there is cooperation among team members, including cooperative task orientation, cooperative communication, and cooperative interpersonal relationships. Competition among team members can have a beneficial effect as well, in that it fosters cooperative communication when the competition centers on the

use of tangible resources (Ghobadi & D'Ambra, 2012). Team trust facilitates the team processes of coordination, communication, and cooperation, which, in turn, are related to team effectiveness (Webber, 2000).

Knowledge sharing provides individuals with a better understanding of the knowledge and skills of other members (Ghobadi, & D'Ambra, 2012). Similarly, learning behaviors (e.g., seeking feedback, sharing information, asking for help, talking about errors) are related to performance and satisfaction in diverse teams (Yeh & Chou, 2005). Efficiency of integration is enhanced by common knowledge, positive attitudes toward learning, past experience in cross-functional collaboration, organizational processes for building social capital, and shared narratives. Flexibility of integration is enhanced by generative learning, defined as the continual evaluation of the way solutions are created (Huang & Newell, 2003). Knowledge integration is "an ongoing collective process of constructing, articulating, and redefining shared beliefs through the social interaction of organizational members" (Huang & Newell, 2003).

Inhibiting factors. Although competition for tangible resources can be beneficial, competition for intangible resources, such as status and power, is related to less cooperative task orientation and cooperative communication. Situational awareness is important for monitoring competitive behaviors to ensure they are productive (Ghobadi & D'Ambra, 2012).

Suggested strategies. Leaders and other team members should work to foster cooperative behaviors for task, communication, and interpersonal relations. Additionally, they should try to avoid political competition (e.g., status, power; Ghobadi, & D'Ambra, 2012). To facilitate the development of trust, leaders should help to enhance the reputation of team members because a positive reputation increases trustworthiness (Webber, 2000). To increase positive attitudes, leaders should communicate the objectives and benefits of the project, as well as promote the project to build common knowledge and its perceived usefulness. Social capital can be enhanced by forming relationships and developing shared narratives. Throughout the team's life span, procedures should be continually reassessed to enhance flexibility and generate learning (Huang & Newell, 2003).

Merger and Acquisition. Merger and acquisition (M&A) involves the buying, selling, dividing and combining of different companies. A substantial amount of research has been conducted on the human, organizational, and cultural aspects of M&A (Marks & Mervis, 2011). This review considers how to effectively integrate two distinct organizations with unique cultures.

Enabling factors. Factors that facilitate integration during M&A include developing a realistic understanding of the two organizations and how they are integrating. Additional aspects incorporate a partnering mindset, involving a positive view of the combination; adaptability to change; a deep understanding of the other culture; and an environment that supports reflection and continuous improvement (Marks & Mervis, 2011).

Inhibiting factors. Differences in organizational culture can be an inhibiting factor when these differences are not actively addressed (Seo & Hill, 2005). Indeed, underestimating the difficulties of merging two cultures has been cited as a major factor in M&A failure (Marks &

Mervis, 2011). Prior to the merger, anxiety and uncertainty related stress can be a problem, which can be followed by loss of identity and purpose when the former organization no longer exists. Competitive and antagonistic relations between members of the combining organizations can be problematic. Perceptions of unfairness can lead to reduced satisfaction and organizational commitment. Role ambiguity and role conflict are common, as well as a perception that the job has become less desirable though reduced autonomy and responsibility resulting from the combination (Seo & Hill, 2005).

Suggested strategies. Mark & Mervis (2011) suggest that leaders should provide a realistic preview that provides detailed information regarding the timeline of a combination, how it will affect employees, and other pertinent information. Additionally, they should encourage employees to develop a combination mindset consisting of trustworthy dealing, common interest, complementary skills, and a spirit of cooperative competitiveness.

A variety of interventions for adapting to change have been implemented during M&A (Marks & Mervis, 2011). These interventions may be emotional (e.g., 'grieving' meetings to celebrate the end of the existing organization), cognitive (e.g., calculating the plusses and minuses of the combination), acculturative (e.g., combining counterparts from each side), or behavioral (e.g., defining the behavioral role of leaders). Deep cultural learning interventions involving cross-company dialogue and culture clarification workshops have a strong positive effect on integration success (Marks & Mervis, 2011). Weak cultural interventions, such as show and tell presentations, informal Q&A, and official communications about cultural differences, should be avoided; these can increase stereotypes and highlight differences. The use of transition teams is another common strategy; however, more research is needed to understand their effectiveness (Marks & Mervis, 2011).

After the integration, it is important to conduct an ongoing examination of progress and problems. A constant flow of operational and behavioral information should be provided, which describes how the business is performing and how people are acting and feeling (Marks & Mervis, 2011).

Team development. Team development involves the formation of a new team, which entails establishing a shared understanding of roles and responsibilities, defining tasks and processes, and developing trust and cohesion. A number of models describe the developmental stages of teams; however, many of these models tend to parallel Tuckman's classic and widely-cited 1965 model, which proposed that teams go through the stages of forming, storming, norming, and conforming (Kozlowski and Klein, 2000). The team development literature considered how to effectively establish new teams, including factors such as building cohesion, clarifying roles and responsibilities, and establishing a shared understanding of goals.

Enabling Factors. Effective coordination among team members is a critical enabling factor. Team coordination strategies may be trained through dynamic adaptation of teamwork processes in response to changing internal and external conditions. Serfaty, Entin, and Johnston (1998) developed a model of coordination that links the concepts of mental models, adaptive coordination, and shared knowledge, providing empirical support that this framework can be used for training to improve performance. The research focus on shared mental models

specifically, tactical decision making in U.S. Navy combat information centers and may likely generalize to other military teams.

In order for teams to develop and function rapidly, it is critical to have a shared mental model of who is doing what on the team, how responsibilities are shared, and what team members expect of one another. A shared understanding of goals and expectations helps to focus the team on what needs to be accomplished, how it should be accomplished, when it needs to be accomplished by, and why the team is doing it (Salas, Rosen, Burke, & Goodwin, 2009). Additionally, it is beneficial for individual team members to possess a team or collective orientation, which is defined as "a preference for working with others and the tendency to enhance individual performance through the coordination, evaluation, and utilization of task inputs from other group members while performing group tasks" (Salas et al., 2009, p. 200).

Based upon a review of the literature, Salas and colleagues (2009) identified mechanisms of expert team performance:

Shared mental models*:* Team members anticipate each other, can communicate without being overt, interpret environmental cues in a compatible manner, reach an intuitive consensus on problem understanding and resolution, and use concise and standardized communications.

Optimization of resources through learning and adapting*:* Team members compensate for one another, reallocate functions as needed, engage in a deliberate process of maintaining and building expertise, adjust performance processes to meet change, seek feedback, and discuss errors.

Clear roles and responsibilities*:* Teams manage expectations, have members who understand each other's roles and how they fit together, and ensure team member roles are clear but not overly rigid.

Clear vision and purpose*:* Team members have a clear, valued, and shared vision with a clear and common purpose and values that guide them.

Regular feedback*:* Team members engage in a cycle of pre-briefs before performance and debriefs after performance, so that they regularly provide feedback to each other, establish and revise team goals and plans, differentiate between priorities, have mechanisms for anticipating and reviewing problems, diagnose team effectiveness, generate lessons learned, and discuss performance strategies.

Strong leadership*:* Team members have strong team leadership, are led by someone with good leadership skills; have team members who believe the leader cares; and have leaders that provide situation updates, foster teamwork, coordination, and cooperation, monitor and correct their own work, provide guidance for making improvements, and set priorities.

Supportive group climate*:* Team members develop a strong collective sense, so that they manage conflict well, trust other team members' intentions, believe in the team's ability to

succeed, create an atmosphere that encourages learning, and feel the team is safe for taking interpersonal risks.

Optimization of performance*:* Team members manage and optimize performance outcomes, so that they make fewer errors, communicate frequently enough, make better decisions, have a greater chance of mission success, and adjust performance processes as needed.

Cooperation and coordination*:* Team members identify work requirements, ensure that the team possesses the right mix of competencies, consciously integrate new team members, distribute and assign work thoughtfully, examine and adjust the workplace to optimize communication and coordination, ensure members have the information they need, and effectively manage conflict (Salas et al., 2009).

Suggested Strategies. Organizations should take advantage of the initial stages of group development, when employees are most malleable and open to guidance. Leaders should play an active role in team socialization. Socializing newcomers to the group helps to maintain existing norms and expectations. Shared systems of meaning enhance social and work interactions and are essential for long-term group functioning (Salas et al., 2009).

Change and Adaptation

Learning Organizations/Continuous Learning. A learning organization, or an organization that engages in continuous learning, is "an organization which facilitates the learning of all its members and continuously transforms itself" (Pedler, Burgogyne, & Boydell, 1997). The organization does not only engage in adaptive learning, which is necessary for survival, but also engages in generative learning, which enhances the ability to create (Cors, 2003). This literature considers how an organization should adapt to new situations through listening and learning as well as the influence of senior leaders and staff on learning. The importance of continuous learning has been emphasized in the Army doctrine (ADRP 3-0, 2012a; ADRP 5-0, 2012 b). Although continuous learning is highly valued throughout the Army, it is particularly germane to the topic of integration because successful integration requires adapting to change and learning how to best perform under new circumstances.

Enabling Factors. A variety of information sharing and learning processes have been identified as enabling factors for learning organizations. Two core factors include team learning through working together, as well as double loop learning, which involves asking questions about the reasons and motives behind the facts in addition to asking questions about the facts themselves (Cors, 2003).

Mental models that allow organizational members to develop a common understanding and put aside old ways of thinking help to establish effective group norms and communication routines that are set on values of open communication. A shared vision helps to create a sense of ownership within the team, while systems' thinking helps employees understand how the organization really works (Cors, 2003; Maani & Benton, 1999; Senge, 2006). Cors (2003) noted several characteristics that have been identified in the literature as conducive to continuous learning: personal mastery (learning to be open with others), stewardship (internal commitment

to seek truth, transparency, and personal responsibility in the workplace), and an achievement mindset (the desire to achieve in the organization; Senge, 2006).

Zellmer-Bruhn and Gibson (2006) found empirical support for the idea that knowledge management captures and transfers dispersed knowledge and increases team learning, which in turn, can enhance performance and interpersonal relations. According to the ADRP 3-0 (2012a), "Knowledge management enables commanders to make informed, timely decisions despite the uncertainty of operations" (p. 3-2). Three major components of knowledge management include the people who create, share, and use knowledge; the processes used to create, capture, organize, and apply knowledge; and the tools/technology that help put the knowledge products into organized frameworks.

Another critical factor when building learning organizations involves collaboration among employees. As described in the ADRP 5-0 (2012b), collaboration helps to foster critical and creative thinking and the sharing of ideas, opinions and recommendations. Effective collaboration and dialogue requires a mutually respectful competition of ideas, in which team members feel comfortable openly expressing their ideas and voicing contradictory opinions. Collaboration can help to build a shared understanding of the situation, reduce the amount of time needed for planning, and increase the ability to adapt quickly (ADRP 5-0, 2012b).

Leadership is a crucial factor for organizational learning (Vera & Crossan, 2004). Leaders must actively work to foster an adaptive, learning environment (ADRP 3-0, 2012a), including an inquiring climate that allows members to challenge and experiment to improve organizational functioning (Senge, 2003). While senior leadership that promotes learning is useful at a macro-level, local responsiveness that allows for differences among smaller teams also enhances learning (Zelmer-Bruhn & Gibson, 2006).

Rather than reflecting after an action occurs, reflection and action should occur simultaneously (Cors, 2003). Continuous assessment is a critical factor for organizational learning. It allows for recognition of shortcomings in plans as well as changes that occur in the environment. Occurring on a continuous basis, assessment serves as a primary feedback mechanism that enables learning and adaptation (ADRP 5-0, 2012b). Van der Vegt, de Jong, Bunderson, and Molleman (2010) found that group feedback is particularly beneficial for team learning when power asymmetry exists between group members, such as the power asymmetry that exists from grade differences within Army units.

Inhibiting Factors. Certain types of communication strategies implemented by the organization to facilitate learning actually have the opposite effect. Some experts have suggested that certain corporate communication techniques can block learning when they simply ask employees to voice concerns without promoting individual accountability. These techniques may teach employees their role is to criticize management and that management is supposed to fix the problems, which inhibits double loop learning (Senge, 2003).

A focus at the macro level, emphasizing global integration and strict standardization, can inhibit learning (Zelmer-Bruhn & Gibson, 2006). Smaller organizational groups and teams need some flexibility to meet their unique needs.

Suggested Strategies. Cors (2003) identified a number of suggested strategies for developing a learning organization. The organization should maintain an awareness of the external environment in which it operates so that it can adapt effectively to meet changing circumstances. Leaders should work to develop a shared vision by forming a plan, while empowering employees to provide input. Open dialogue and inquiry between employees and leadership, collaboration, and team learning should be promoted across the organization (Cors, 2003), while standardization across the organization should not be overemphasized (Zelmer-Bruhn & Gibson, 2006). A knowledge management system should be implemented to capture and share learning (Zelmer-Bruhn & Gibson, 2006). Additionally, group performance feedback should be provided (Van der Vegt et al., 2010). Leaders should use transformational leadership behaviors to have a positive impact on learning, challenge institutional learning, and allow the organization to move beyond the status quo (Vera & Crossan, 2004). Leaders should also work to create continuous learning opportunities (Cors, 2003).

Organizational Change. Organizational change occurs when an organization seeks to implement conditions that are currently different from the standard practices or procedures. The implementers of change must be able to convince employees that the status quo is not acceptable and motivate them to change their behaviors (Furst & Cable, 2008). Much of the research examining organizational change focuses on individual and contextual factors that result in resistance or commitment to change efforts (Robertson, Roberts, & Porras, 1993). This review considers factors related to an individual and team's willingness and ability to adjust to changing circumstances, of which integration is one such circumstance.

Enabling Factors. Resistance to change is less likely when leaders use consultative strategies, involving employee input in the change process (Furst & Cable, 2008). Similarly, Wanberg and Banas (2000) found that employees believe change is more beneficial when they had the opportunity to participate in the change event with senior leader member interchange. Employees were more likely to interpret change strategies in a positive light (Furst & Cable, 2008). The information about the change helps to increase acceptance of change (Wanberg & Banas, 2000). Open communication, collaboration, and taking responsibility help to facilitate successful change (Robertson, Roberts, & Porras, 1993). Herold, Furst, and Caldwell (2007) found that change self-efficacy (i.e., the capacity or self-perceived confidence to deal with change) is positively related to commitment to change, which includes positive attitudes toward change, alignment with the change, intentions to support it, and willingness to work toward successful implementation. In addition, personal resilience (including self-esteem, control, and optimism) helps increase acceptance of change (Herold, et al, 2007; Wanberg & Banas, 2000).

Inhibiting Factors. Resistance to change is more likely when leaders use hard tactics, such as sanctions and legitimization, to implement change. When low leader member exchange exists, employees are more likely to interpret strategies as reflecting dislike, as well as being calculative and politically motivated (Furst & Cable, 2008). If the change is occurring within a turbulent environment in which there are several other ongoing changes, commitment to change weakens. Alternatively, high change efficacy can lessen these negative effects (Herold, et al, 2007). Employees possessing low levels of change acceptance experienced less job satisfaction, more work irritation, and increased intentions to quit (Wanberg & Banas, 2000).

Suggested Strategies. Quality relationships between leaders and team members should be fostered to facilitate the change process. Leaders should use consultation, allowing employees to provide feedback or assist in the change process (Furst & Cable, 2008). Encouraging employee participation and providing information about the change helps to increase employees' perceptions of justice in the situation (Wanberg & Banas, 2000). Breaking a large change into a series of smaller changes can also be beneficial. By facilitating and supporting small changes that yield successful outcomes, it builds change self-efficacy (Herold et al, 2007). Finally, providing training related to the change as well as feedback and rewards throughout the change process can help to increase confidence in the ability to handle change (Wanberg & Banas, 2000).

Team Adaptation. Team adaptation is defined as "a change in team performance, in response to a salient cue or cue stream that leads to a functional outcome for the entire team. Team adaptation is manifested in the innovation of new or modification of existing structures, capacities, and/or behavioral or cognitive goal-directed actions (Burke, Stagl, Salas, Pierce, & Kendall, 2006, pp. 1189-90). Phases of adaptation include situation assessment, plan formulation, plan execution, and team learning. Adaptive team performance is an emergent construct that occurs over time, whereby team members use resources to functionally change current cognitive or behavioral goal-directed action or structures to meet expected or unexpected demands (Burke et al., 2006). This topic considers how teams and individuals within those teams adapt over time through situational assessment and team learning.

Enabling Factors. Team adaptation is enabled by the process of situational assessment, which provides meaning to the situation and facilitates communication among team members (Rose, Bedwell, Wildman, Fritzsche, Salas, & Burke, 2011). Situation assessment and sensegiving communicates meaning to the team and leads to faster recognition of cues related to subsequent team adaptability, while situation awareness allows team members to be better able to forecast events and be proactive and flexible.

Plan formation allows the team to define goals and strategies, make contingency plans, and define roles. Plan execution allows for coordinating behaviors among team members, monitoring performance, providing back up for teammates, and revising strategies as needed. Team learning allows the team the opportunity to recap and reflect on events. These behaviors help to build trust, motivation, shared mental models, situational awareness, and psychological safety (Burke et al., 2006; Rose et al., 2011).

Across the phases of team integration, it is beneficial for the team to use problem solving routines, balance decentralization and centralization of teams to gather information, synthesize and coordinate actions, expect the need to make changes, track the big picture, and have a common understanding of the situation (Klein & Pierce, 2001). Team self-management, in which empowerment creates a sense of responsibility for work outcomes, leads to a greater likelihood of engagement in adaptation (Burke et al., 2006). Finally, updating mental models allows teams to engage in more novel interactions and enhanced processes, which increases adaptive performance. Thus, not only are shared mental models important, but they must also be flexible in order to successfully adapt in novel situations (Uitdewilligen, Waller, & Pitariu, 2012).

Individual characteristics that can facilitate adaptation include task/team expertise, team orientation, openness to experience, and cognitive ability (Burke et al., 2006). Teams are more likely to adapt when teams consist of knowledgeable members who share a common understanding of goals, tasks, priorities, strategies, norms, and competencies. Additionally, problem solving skills are very important across a variety of components in the adaptation process (e.g., anticipating problems, realizing the need to change plans, modifying plans, considering the big picture, understanding the situation; Klein & Pierce, 2001).

Suggested Strategies. Training can be implemented to facilitate adaptability, including training on dealing with errors or unexpected events, scenario-based training, team adaptation and coordination training, and training on problem solving and monitoring (Burke et al., 2006; Klein & Pierce, 2001). Mastery goals rather than performance goals should be emphasized. Additionally, cognitive flexibility can be fostered by presenting task principles from many perspectives (Burke et al., 2006).

Low workload periods should be used to re-plan or examine how things are working, foster communication, and evaluate progress. The team should meet about changed plans to ensure effective communication and establish a common ground. Additionally, situational awareness calibration exercises can be conducted to facilitate communication (Klein & Pierce, 2001).

Team Member Change. Team member change refers to the change team members experience for a variety of reasons (e.g., new opportunities, low performance, lack of critical skills), which may result in a stimulating effect or a potential decrease in team performance. This is an emerging construct in the literature, which emphasizes the flux in coordination, or degree of variance in the team's performance, that is experienced as the team changes. This review considers the need for reassessing expertise and roles of unit members when accommodating for the new members of the team (Summers, Humphrey, & Ferris, 2012).

Enabling Factors. Research suggests that greater information transfer leads to less flux in coordination (Summers et al., 2012). In other words, disseminating information to new team members helps to reduce the amount of disruptive variance in the team's performance.

Inhibiting Factors. As described above, team member change often leads to a flux in coordination that leads to greater variance in the team's functioning and can serve as a disruption. Research supports the notion that flux in coordination does indeed lead to decreases in performance (Summers et al., 2012).

Suggested Strategies. Organizations should institute mechanisms to facilitate the transfer of tacit knowledge to new team members through training or information management systems. New members should be socialized to learn group norms and expectations because this can affect information sharing, transfer, and processing (Summers et al., 2012).

Risk. Risk has been defined as the magnitude of losses and/or gains associated with a particular event. Risk is a socially produced construct; various groups may perceive and

interpret potential hazards differently (Lupton, 1999; Miller, 2009). Effective integration of a team may be ultimately determined by a commander's willingness to accept risk and how that risk is determined, assessed and acted upon. For example, if the commander or supporting BCT staff of a gaining unit believes that the negatives outweigh the positives for a given specialized team, its capabilities may not be fully realized.

Enabling Factors. Several of the articles reviewed noted the importance of open communication to identify and address risk. For example, questioning to gather more feedback has been shown to facilitate risk identification and enhance performance (Winch & Maytorena, 2009). In addition, open communication about occupational risk increased employees' trust beliefs, such that the organization was perceived as more trustworthy (Conchie & Burns, 2008).

Harwood and Chapman (2009) studied the concept of 'risk bartering' in post-merger and acquisition integration teams. Risk bartering explains how key individuals in the team engage and negotiate with each other about the integration using risk as an underlying trading currency. When risk bartering is actively managed by aligning individual and organizational objectives during the integration, it can facilitate organizational risk efficiency. Additionally, when key players in the integration engage in risk bartering to make the situation more personally advantageous, it can build an element of ownership and reduce resistance to the integration (Harwood & Chapman, 2009).

Inhibiting Factors. Several inhibiting factors related to risk communication were also identified. The strategy of using single, independent questions was negatively related to identifying risks (Winch & Maytorena, 2009). When there is a lack of organizational trust, communicating more negative risk information makes a bad situation worse; instead, it is preferable to focus on the situation that gave rise to the negative risk information and communicate openly about the remedial steps (Conchie & Burns, 2008).

Although risk bartering can have enabling effects during integration, negative consequences may also result. When individuals focus too strongly on their individual self-interests rather than the organizational objectives, risk bartering may cause the outcome to be less efficient in terms of organizational risk versus reward (Harwood & Chapman, 2009).

Suggested Strategies. Leaders and team members should use a feedback style to understand the problem, as this strategy helps with sensemaking (Winch & Maytorena, 2009). Additionally, leaders should increase trust perceptions among employees by communicating openly about risk (Conchie & Burns, 2008). This would apply both internally within the team and between the specialized team and its integrating BCT.

Regarding the concept of risk bartering during integration, Harwood and Chapman (2009) suggest the use of a liaison to align the motivational drivers and objectives of individual team members and the organization. They specify that the liaison "should be a trusted member of the organization, have experience of all the areas under consideration for integration, be fully conversant with risk management processes, and have sufficient authority to question and challenge the view of all parties involved" (Harwood & Chapman, 2009, pp.175-176).

Culture and Climate

Organizational Culture. Organizational culture has been defined as "a pattern of shared basic assumptions invented, discovered, or developed by a given group as it learns to cope with its problems of external adaptation and internal integration" that have worked well enough to be considered valid, and therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems" (Schein, 1992, p.9).

Organizational culture includes three fundamental layers: *artifacts*, which are surface-level realizations of underlying values such as symbols, organizational language, narratives, practices; *espoused values* that are endorsed by the organization; and *basic underlying assumptions* that reside at the core of organizational culture (Schein, 1992). The organizational culture review considers how organizational members develop a shared understanding. Additionally, the evaluation of cultural differences between groups can facilitate integration. Related to the present research, the organizational culture of highly technical military intelligence units may differ considerably from the organizational culture of a tactical BCT.

Enabling Factors. Organizational culture is passed on to new group members through a variety of communication and socialization processes (Schein, 1992). Interaction through communicating and exchanging information, sharing ideas, and exchanging work products creates the emergence of culture (Kozlowski & Klein, 2000). Knowledge sharing has been identified as a critical enabling factor within new organizational entities. Knowledge sharing can be facilitated through hierarchical structures, the larger organizational context, and micro-politics at the smaller team-level (Friesl, Sackmann, & Kremser, 2011).

Understanding gaps between desired and actual norms through the use of an organizational culture assessment can assist the organization in moving toward the desired culture (Kilmann & Saxton, 2011). This type of cultural assessment can also be applied to better understand the cultural differences between two groups. By evaluating and understanding the differences in organizational cultures, it provides leaders with the opportunity to actively and effectively address divergent organizational values when the groups are being integrated.

Inhibiting Factors. When two groups are integrating, differences in the organizational cultures can be a serious inhibiting factor. When organizational leadership fails to actively address such differences, it often leads to major problems during integration (Marks & Mervis, 2011; Seo & Hill, 2005).

Suggested Strategies. Organizational integration of differing groups should identify a clear understanding of the purpose and operational relevance of team integration. Convey the importance of commander involvement in integration, and inform all involved of the practical challenges of integration (Grome, Crandall, Rasmussen, & Wolters, 2012).

Team Mental Models/Team Climate/Team Coherence. Team mental models are team members' shared, organized understanding and mental representation of knowledge about key elements of the team's task environment (Klimoski & Mohammed, 1994). Team climate represents group-level shared perceptions of important contextual factors that affect group

functioning and outcomes. Team coherence involves complementary cognition and behavior, along with shared affect and climate perceptions, that provide a foundation for essential team capabilities (Kozlowski, S. W. J., Gully, S. M., McHugh, P. P., Salas, E., & Cannon-Bowers, 1996). While each of these constructs possesses some unique distinctions, we considered them together due to their common focus on developing shared perceptions among team members. This body of literature was included because it considers how the development of a shared understanding of the task, team, and situation can improve team effectiveness.

Enabling Factors. Research supports the idea that shared mental models are related to increases in performance (Mathieu, Heffner, Goodwin, Salas, & Cannon-Bowers, 2000). Shared mental models can be facilitated by knowledge about the other team members, which leads to less explicit requests, more information transfer, and more efficient coordination (Espevik, Johnsen, Eid, & Thayer, 2006). In regard to team structure, hierarchy helps to enable within team communication and information sharing, as there is more acceptance of information provided by senior leaders (Friesel, Sackmann, & Kremser, 2011). Cohesion among the team increases after stressful events and with greater familiarity between team members, while perceived leadership and hardiness are predictors of cohesion (Bartone, Johnsen, Eid, Brun, & Laberg, 2002).

Behavior-based training enhances attitudes toward coordination as well as coordination behaviors and performance (Leedom & Simon, 1995). Development of a team strategy enhances team mental models, processes, and coordination. Research by Dalenberg, Volgelaar, and Beersma (2009) found that a discussion on team strategy improved performance via improved processes and coordination and is especially important when accuracy, not just speed, is a factor in defining performance.

Reflexivity is an overt reflection on group objectives, strategies, and processes, and adapting them to current or anticipated events. Reflexivity increases performance, leads to more similar mental models, more commander communication, and better implementation of strategy (Gurtner, Tschan, Semmer, & Nagele, 2007).

Inhibiting Factors. In new organizational entities, when employees are placed in positions without the necessary functional background and when they are overburdened with tasks, resentment occurs. Micro-politics can be problematic when there are competing loyalties between the core group and the broader organization. Suspicion about the project of the team may occur when there is a lack of clear understanding about the purpose and benefits of the team (Friesel et al., 2011).

Suggested Strategies. When a new team is developed, it is important to state the purpose and benefits of the team to facilitate acceptance and to form a common social identity. A boundary spanner or liaison should be used, who possesses experience, a good reputation, and sufficient seniority or rank (Friesel et al., 2011), . Team strategy discussions should take into account the following team processes: setting and prioritizing team goals, defining individual member roles, passing information, coordinating actions, cooperating, and assisting (Dalenberg et al., 2009). Training can be used to standardize behavior and get people more familiar with

each other to improve coordination, as well as to experience challenges as a group (Friesel et al., 2011; Leedom & Simon, 1995).

Leaders of the new team can link events to shared unit goals and ideals (Friesel et al., 2011). Leaders can also shape how stressful events are interpreted; thus, it is useful to try to frame negative situations as a part of life that is worthwhile and an opportunity to learn more about the self and others (Bartone et al., 2002). The new team should also engage in reflexivity to review task performance, consider potential improvements in performing the task, and develop suggestions for task improvement for the future. It is helpful to reflect after some experience with the task because it can build off of some experience gained (Gurtner et al., 2007). Active feedback and discussion sessions should be used to develop mental models. While team processes naturally improve over time, mental models do not; it is important to actively develop shared mental models (Mathieu et al., 2000).

Integration in Military Organizations

The next section provides the results from a review of the literature in which integration from a military perspective was specifically reported. The topics that emerged from this review, reflected factors such as sharing knowledge of the expertise possessed by key individuals in both groups, clearly defining leadership roles and related management processes, instituting effective training tools to prepare and support group members in the integration process, and creating roles (and supporting individuals in those roles) that specialize in facilitating the integration process.

Enabling Factors. Having a clear shared understanding of leadership roles, such as chain-of-command, and well-defined command relationships (e.g., tactical control as compared to operational control) were discussed as integral to successful integration and coordination of different military teams (DOD, 2010). This factor included fostering/developing shared knowledge of command decision-making processes and the , for example, shared knowledge of mission command systems (DOD, 2010).

In addition, the following organizational factors were identified as ones likely to differ across groups: doctrine (Grome, Crandall, Rasmussen, & Wolters, 2012; Hastings, 2005; Jackson, 2010), organizational structure (Jackson, 2010), standing operating procedures (Jackson, 2010), specialized capabilities (Vermeulen, 2012), training models (Jackson, 2010), and use of terminology (Grome, 2012; Jackson, 2010). Thus, team members should be made aware of these differences and, especially, how these differences may affect the integration process.

Inhibiting Factors. A number of sources described the converse to qualities expressed as enabling factors (see above) as key inhibiting factors. In addition to these, specific discussion of inhibiting factors noted several additional factors with the potential to negatively affect integration in a military context. One factor was differences in group cultures (Grome, et al, 2012; Hastings, 2005). These cases involved situations where differences in group norms, values and shared understanding of how things should be done are challenged by alternative views of the same. Both Grome et al. (2010) and Hastings (2005) highlighted that differences between various command structures among integrating groups can be a challenge to integration. Large

differences in leadership styles (e.g., formal vs. informal) can negatively impact how members of various groups reacted to assignments by commanders outside of their habitual group. Specifically, and also relating to the factor of culture addressed above, the inability of group leaders to set aside biases related to contrasting group cultures was identified as being particularly challenging to group integration (Hastings, 2005).

Suggested Strategies. The military sources offered several strategies for enhancing integration among groups. One particularly valuable suggestion was to clearly define and put in place coordinating roles for integration. In particular, sources addressing Special Forces integration provided clear examples for developing Liaison Officers (LNOs; DOD, 2010; Hastings, 2005).

Suggestions were also provided for the development and use of specific training and facilitation tools to support a structured method for interaction and communication (DOD, 2010; Hastings, 2005). These included specific training for coordinating personnel to utilize clear communication methods with supported elements (Hastings, 2005) and develop tools, such as checklists that could be used during briefings and coordination by both coordinating personnel and group commanders (e.g., for comparing key issues such as task organization, mission coordination, C2 systems, unit missions key tasks, rules of engagement, and synchronization of battle rhythms; DOD, 2010).

Several recommendations were provided to assist in creating clearer mission command relationships between integrated groups. Some examples included negotiating to create clear and unambiguous chain-of-command relationships, avoiding frequent transfer of supporting elements among supported commanders, involving representatives of supporting groups into the planning process of the supported group, and ensuring that senior commanders of the supported unit are involved in integration activities (DOD, 2010). In this context, Grome and colleagues (2010) also suggested the need to match the supporting unit with supported unit mission requirements. Finally, to address the enabling factor of understanding key operational terminology, described above, Jackson (2010) suggests that a conscious effort be made to develop a shared terminology among integrated groups to enhance synchronization of efforts.

Enabling Factors Summary

Listed below are the core enabling factors identified in the literature as facilitating team integration. The factors are presented roughly in order of their importance.

Cultural Understanding. When integrating two distinct cultures, it is crucial for those on both sides of the integration to gain an understanding of the other group's cultural values and norms. Identifying cultural differences and actively working to address them (e.g., through cross-organization dialogue or culture clarification workshops) can make a vast difference in integration success.

Open Communication. One of the critical themes that emerged from the literature findings was the importance of communication. It is important to have an open and transparent flow of communication to facilitate information sharing and clarity between groups. In order for

this to occur, the organization needs to have a climate that supports inquiry and psychological safety, so that team members feel comfortable expressing their opinions and questioning how and why practices and procedures are in place.

Knowledge Management. Although open communication is necessary for information sharing, knowledge management is needed for capturing and organizing diverse knowledge. The use of a knowledge management system facilitates the creation, organization, sharing, and use of knowledge. When integrating teams, knowledge management can be applied to share knowledge between the superordinate teams, as well as to share knowledge between other smaller subgroups within those teams to facilitate the application of lessons learned.

Shared Understanding & Vision. Integrating teams must be able to reach a shared understanding, including determining a shared vision for the team's purpose and function. Developing shared mental models allow those involved in the integration to gain shared perceptions and expectations of important factors related to group functioning and outcomes.

Clear Roles & Responsibilities. In addition to gaining a shared understanding of the high-level vision for the integration, it is also important to gain a shared understanding of the roles and responsibilities of those involved and how the small team (i.e., team being integrated into the larger team/unit/organization) will function within the larger context of operations.

Strong Leadership. Leaders serve a crucial role in the integration process and have the opportunity to facilitate many of the other enabling factors described in this section (or to hinder the integration process through ineffective leadership). Leaders should serve as advocates of the integration with a clear vision of its purpose and benefit, while striving to implement a climate that facilitates its success.

Collaboration/Participation. While leadership is important, it is also necessary for leaders to gain collaboration and participation from their subordinates. Collaboration and participation can increase the effectiveness of integration, both through the ideas and assistance that are provided, as well as through the added commitment it encourages from team members.

Reflection/Assessment. Reflection and assessment should occur on a continual basis, as it provides the opportunity for recognition of shortcomings and potential improvements. It serves as a primary feedback mechanism through which information is gained to evaluate the success of current and prior actions.

Learning & Adaptability. Learning and adaptability are vital for to making successful improvements during the integration process. Continuous learning from prior experience and adaptability to changing circumstances is needed for integration to be effective in the long-term.

Socialization. When bringing a new team on board, it is beneficial to provide them with socialization opportunities. This includes formal socialization procedures that provide training and information to the new personnel, as well as informal interpersonal socialization to encourage familiarity.

Cooperation/Coordination. Another important enabling factor involves cooperation and coordination between the two integrating teams. This includes a positive relationship between the teams with a willingness to be open, focus on the overall success of the organization, and be proactive in coordination efforts to facilitate efficient and effective action.

Trust. When integrating teams rapidly, trust is particularly important so that teams feel they can count on one another to complete their mission. While trust is often slow to develop, implementing principles of swift trust and encouraging perceptions of trustworthiness among and between teams can help to facilitate integration success.

Cohesion. Team cohesion helps to facilitate team performance and effectiveness. Although social cohesion may be slow to develop, task cohesion can be developed more rapidly because it involves the team's shared commitment to work together and achieve the team's goals.

Inhibiting Factors Summary

Similarly the core inhibiting factors were:

Over-standardization. Over-standardization enforced from the macro level can be problematic. Though a general framework for integrating teams can and should be in place at the broader organizational level, each integrating team should be allowed some flexibility to tailor the details of the integration as needed based on their unique circumstances.

Ineffective Communication Strategies. Although communication is critical for integration success, certain communication strategies can be problematic. Problematic strategies include those that merely push information out. Additionally, the use of hard communication tactics from leadership that avoid gaining perspectives from others may also impede rather than facilitate integration. Communication should encourage inquiry, new insight and ideas, and critical evaluation of problems and potential solutions.

Differences in Organizational Culture. Differences in organizational culture between the two integrating teams can be a major roadblock to successful integration. Although differences are expected, it is important to actively address these differences by facilitating understanding between the teams and developing a plan for how they can function effectively together.

Lack of Information. Lack of information about the integration can lead to confusion, frustration, and other negative attitudes, as well as to operational problems due to an overall lack of clarity. Thus, it is important to communicate openly and to share information between teams. In addition, lack of information about the integration's purpose, structure, and procedures, and about each team's capabilities can also be problematic. It is important to facilitate familiarity between teams and team members.

Negative Relations. In addition to a lack of knowledge about the integrating teams, negative relations between the teams can also emerge. Micro-politics and suspicion can emerge when efforts to boost positive relationships are not made by leadership. Competition over

intangibles such as status and power and interpersonal conflict can cause further strife in team relationships.

Role Ambiguity and Role Conflict. Ambiguity and conflict regarding roles and responsibilities of the integrating team can cause serious problems when the team members and leaders do not have a clear, shared understanding of each team's responsibilities.

Strategies and Individual Characteristics for Promoting Enabling Factors

Suggested strategies identified in the review for promoting the enabling factors include:

Develop a shared vision. Actively work toward building a shared understanding and vision for the integrated teams. Discuss, come to agreement, and document the vision for each team's purpose and functions to allow all team members to gain shared perceptions and expectations.

Connect to the environment. To be successful, the integrated teams need to work in tune with their current environment. Monitor the environment to observe opportunities and threats. As changes occur, adaptations may need to be made to the way the teams' function, so it is important to continue monitoring and assessing to stay connected to the environment.

Facilitate open dialogue & inquiry. Open communication is a key factor for the effectiveness of integrating teams. Leaders at all levels should facilitate open dialogue and inquiry, both between and across the two integrating teams to facilitate information sharing and clarity.

Implement a knowledge management system. A structured knowledge management system should be implemented to facilitate the creation, organization, sharing, and use of knowledge between the two teams to encourage the documentation of effective practices and lessons learned.

Provide a realistic preview of the integration. Prior to the integration, leaders should provide the teams with a realistic preview of the integration. This helps to provide clarity and understanding about the situation, alleviate concerns, and minimize unrealistic expectations.

Implement organizational culture interventions. Integrating teams with two different organizational cultures can be a challenge. It is important to identify cultural differences and actively work to address them through strategies such as cross-company dialogue or culture clarification workshops.

Conduct ongoing assessments. Ongoing assessments provide a structured mechanism for continual feedback, which helps to identify concerns in the way the integrated groups are functioning and realize opportunities for improvement.

Encourage socialization and communication. Socialization and communication between the two integrating teams helps to promote a shared understanding and encourage relationship

building and trust. Socialization activities can include both formal strategies such as training, as well as informal opportunities to interact.

Use an integration liaison. The use of an integration liaison who is a trusted and experienced member of the team can help the integration go more smoothly because it provides a designated point of contact to help work toward developing a shared understanding and facilitating communication between the teams.

Provide training. Formalized training for the integrated teams helps to provide clarity for roles, responsibilities, and procedures that will be utilized to accomplish the mission and allows the teams the opportunity to practice working together.

Foster quality relationships. Provide opportunities for the teams to interact with one another and build relationships, which help to promote the development of trust and cohesion between the integrating teams.

Although the primary focus of this review was on broad factors that facilitate or inhibit the integration of teams, we also noted the individual characteristics that are believed to help enable integration. Individual characteristics include the types of skills and competencies that are important for those in key roles in the integration process. Important individual characteristics identified in the literature include:

Communication and listening skills. Due to the importance of open communication during integration, as well as factors that require open communication such as developing a shared vision and understanding, communication and listening skills are key characteristics that help to facilitate integration.

Social skills. Social skills help to facilitate effective interactions between members of the two integrating teams.

Problem solving skills. During the integration of two groups, it is inevitable that certain challenges will arise. Problem solving skills help team members to effectively work through these challenges.

Personal mastery. Personal mastery involves a focus on continual self-improvement, and, in an integration setting, also involves a focus on improving one's team (Senge, 2006).

Stewardship. Stewardship involves a commitment to seek honesty and transparency, as well as personal responsibility, all of which help to facilitate a smooth integration between teams (Senge, 2006).

Achievement mindset. A desire to achieve in the organization provides team members with more motivation to help the integration succeed.

Proactivity. Being proactive involves anticipating challenges before they arise and increasing preparedness for the integration.

Self-monitoring. Self-monitoring can be useful when integrating team members with different backgrounds and cultures.

Situational awareness. Situational awareness is important for monitoring the progress of the integration and identifying and working through challenges.

Emotional stability. Emotional stability facilitates building trust between the integrating teams.

Team orientation. Team orientation facilitates adaptation to the changes resulting from the integration and an overall focus on working toward the success of the integration.

Experience and competency. Experience and competency will help the integration go more smoothly as team members from both sides recognize the value of the other team.

METHOD

To refine and validate the findings of the literature review, interviews and focus groups were conducted with Army Subject Matter experts (SMEs) who had had direct experience with specialized team integration. The goal was to better understand and determine the accuracy of the factors influencing effective integration and to better understand current Army training intended to prepare Soldiers for team integration. In particular, the intent was to better understand the critical integration challenges influencing the rapid integration of MFTs into the maneuver unit's organization.

Participants

A sample of officers, noncommissioned officers (NCOs), and enlisted Soldiers who had direct experience with specialized team integration participated in the research. The participants were members of one of the four following teams/units four important perspectives: MFT, BfSB, BCT, and SOF.

MFTs, the focus of this study, were included as the exemplar to discover the factors influencing the rapid integration of these teams into the conventional force. Given the recent emergence and importance of MFTs coupled with limited information addressing MFT integration, it was critical to get direct input from leaders and Soldiers of these units to better understand the related integration facilitators and barriers. Similarly, it was important to collect information from senior leaders within the BfSBs that support and prepare MFTs in order to better understand how MFT integration is strategically envisioned.

Participants from BCTs were included to gain the supported unit's perspective and more fully appreciate the factors that expedite rapid synchronization of MFTs and other specialized teams across missions and combat situations. Participants from SOF groups were included to obtain lessons learned from their comparative successes in overcoming obstacles and seamlessly

integrating into conventional units. These participants also were asked questions regarding the SOF community's focus on related Soldier training and development of joint doctrine.

In total, 71 Soldiers participated in the data collection through 24 focus groups and 7 individual interviews. Table 1 provides an overview of participants by rank and team/unit.

Table 1

Perspective by Rank of Data Collection Participants from All Sites

	CPL/ SPC	**SGT**	**SSG**	**SFC**	**MSG/ 1SG**	**SGM/ CSM**	**1LT**	**CPT**	**MAJ**	**LTC**	**COL**	**WO**	**CW2**	**CW4**	**Total**
BfSB	3		2	1	1	1	1	3	2		1	1	1	1	18
MFT	4		3	2			5								14
BCT								1	2	2					5
SOF		1	1	5	9	4		9	4	1				1	34
Total	**7**	**1**	**6**	**8**	**10**	**4**	**6**	**13**	**9**	**2**	**1**	**1**	**1**	**2**	**71**

Materials

In order to ensure standardization of method and balanced coverage of all relevant issues within this research, a standard protocol for the qualitative data collections was developed and used. Three variations of the main protocol for the different types of SMEs were used; one was used in focus groups with the MFT and BfSB participants, one was used in interviews with BCT Soldiers, and one was used with the members of the SOF groups. All protocols consisted of the following major sections:

1. *Introduction and Research Purpose* - This section oriented participants to the purpose of the project. It provided a concise overview of the research and described the topics to be covered during the data collection.

2. *Overview of Privacy Act and Consent Form* - In this portion of the protocol, participants completed the Privacy Act and Consent Forms. They were also informed that there were no consequences if they choose not to participate and that all individual data would remain confidential.

3. *Demographics Questionnaire* - Participants completed the demographic questionnaire in this section, which collected information related to each participant's unit type, echelon, rank, and position. In addition, the questionnaire asked Soldiers to provide name(s) and contact information for another potential Army point of contact (POC) that could provide insights on the integration of MFTs as part of this research. Data collected through this

POC item provided numerous interview leads and resulted in informative interviews with several SMEs.

4. *Understanding Integration in the Operational Environment (OE)* - The focus group/interview portion of the protocol started in this section. This segment of the interviews employed the critical incident technique (Flanagan, 1954). Described by Cooke (1994), this technique enables information to be elicited in a short time frame by providing a context in which participants can describe real world incidents. This technique relies on the personal experiences of participants and is useful in revealing underlying factors that might lead to success in a given situation, even when the participants are unable to label the processes themselves. Specifically, the questionnaire asked participants to describe a situation in the OE where a specialized Army team had to integrate with a conventional unit. It then included a series of related questions to elicit information around the factors that positively and/or negatively influence integration such as leadership, mission type, and group culture, organizational structure, fixed vs. mobile forward operating base (FOB) synchronization, prior preparation, and unit capabilities.

5. *Ideas to Improve Specialized Team Integration, Training and Doctrine* - This portion of the data collection was used to gather data related to the design, delivery, and assessment of classroom and field training intended to enhance the assimilation and employment of specialized teams into BCT units. Items were designed to understand how these variables impact commanders' and staffs' knowledge of the utility, performance capabilities, and employment of the specialized team. Data gathered through these items provided insights into current training practices, challenges, and potential areas where improvements can be achieved.

6. *Conclusion* - The data collection protocol concluded with a short summary thanking the participants for their time.

The full data collection interview protocol and related forms are provided at Appendix A.

Data Collection Procedures

Each session was facilitated by an industrial/organizational psychologist and/or one or more former Special Forces military subject matter experts. The focus groups and interviews were approximately one hour in length. During the focus group or interview, a digital recorder was used to ensure all data were captured accurately (unless declined by the participant(s)), which allowed the research team to clarify notes after the session was complete.

Analyses

Examination and understanding of the focus group and interview data relied on a deductive content analysis process. Deductive content analysis applies a set of procedures to textual data in order to make inferences from it (Weber, 1990). The central goal of this type of technique is to reduce the text into smaller elements that will facilitate understanding of the

content. Specifically, the execution of the content analysis occurred in three stages: training, expert analysis and coding, and analysis of coding data.

Training of Content Analysis Team. Training was required to orient the primary data coders to the analysis procedures the research team would use to examine and categorize the data. The training was designed to enable consistent analysis of transcripts and coding of key "factors that facilitate integration" and "factors that inhibit integration." To increase efficiency and effectiveness, coders were provided with a preliminary list of facilitating and inhibiting factors compiled by each data collection team as part of post data collection reports. The coders were then trained to review transcripts and flag specific statements where the factor was described in the data. In addition, the coders were instructed to highlight statements that reveal new factors not included on the preliminary list. In each instance, training cited example data and factors which did and did not align with the highlighted statements. Attention was also given to highlighting sufficient data so that the factor context could be understood and properly interpreted.

The facilitators reviewed the interview transcripts after each site visit to develop a preliminary set of factors that facilitated and inhibited integration. To begin the process, the lead facilitator for each data collection independently reviewed and identified important data points provided within each individual session by protocol item. Data points were considered to be important if they at least partially addressed one of these research questions:

- What are the primary facilitating factors that enhance rapid integration of small specialized teams, particularly MFTs, into the supported maneuver unit's organization?
- What are the critical inhibiting factors that need to be addressed when integrating small specialized teams, particularly MFTs, into the CF?

Important data points were combined into a summary list of factors across interview sessions. Factors were created by merging key data points that partially addressed a specific topic into short summaries in order to more comprehensively answer a research question. After this initial review, another expert, who was typically the second facilitator in the session, reviewed the primary data again using the same process to identify important points and generate factors. The second expert then refined or added to the factors developed by the lead facilitator. It should be noted that an inclusive approach was used in recording the important points and thus, developing the factors. This approach included points made even by a single participant as long as the point provided an idea that was pertinent, as determined by the experts, in addressing the research questions.

Once both facilitators had independently reviewed the data, they met to discuss results and reach a consensus on the key factors emerging from the data collection. During this process, discrepancies in the identified important points were discussed and resolved while further clarification was provided to remove any ambiguity in the factors. The resulting factors were then recorded and added to a data collection trip report, which summarized the findings for a specific site.

After all data collections were completed, the factors derived were integrated and combined into one list. At this time, the literature review results were closely analyzed again. This assessment indicated that factors identified in the literature and focus groups were similar and complementary; thus, the combined list of factors identified through the focus groups was supplemented and further refined with expounding details identified in the literature. This full list served as the set of preliminary factors used in the Phase 2 coding process.

Phase 2 started with the previously described training of content analysis coders. Upon completion of the training, each coder received a set of focus group and/or interview transcripts for analysis. The coders were required to analyze the data in each transcript and then flag statements that validated a factor included on the preliminary list. To flag a data point, coders used the 'comment' function in Microsoft Word to highlight the statement and then indicate which factor the statement reflects and why. The coders were also instructed to include a (+) or (-) symbol in the comment box. Plus (+) symbols indicated that the statement was discussing the factor (e.g., training) as a facilitator (e.g., access to training) while negative (-) symbols indicated the statement was describing the factor as an inhibitor (e.g., lack of training). The (+/-) denotation was an important element of the quantitative data analysis in determining how a factor was generally perceived. In addition, coders were instructed to flag new factors as well as adjustments to existing factor definitions that surfaced in the transcripts but did not appear on the preliminary list in order to ensure all factors were accurately captured.

To maintain rigor and reliability in the content analysis, 20% of the transcripts were analyzed by multiple team members. Analysis involved each coder independently reviewing the data provided in the transcript and coding comments that were representative of the key factor categories. A statistic of interrater reliability was then calculated by assessing the percentage of times team members identified the same factors. The goal of the process was to ensure that a consistent analytic approach was applied across all of the transcripts and by each participant in the coding process. Results revealed that the percentage agreement ranged from 54% to 83% for all transcripts, with an average of 81%.

Analysis of Coding Data. Once all the transcripts were coded, the data resulting from the coding process were analyzed. The quantitative analysis had three objectives. First, data were analyzed to determine the number of sessions in which a factor was deemed relevant. Second, data were analyzed to indicate which team/unit (MFT, SOF, BCT, or BfSB) indicated the factor was important. To complete the first and second objective, frequencies were run to determine the number of times each factor was highlighted across all teams/units as well as within team/unit. Additionally, percentages were computed to assess the relative importance for each factor.

Third, the (+/-) denotations were analyzed by factor to determine whether it was generally viewed as an inhibitor or facilitator of specialized team integration. To be considered a distinct and critical factor, the factor needed to be discussed in 2 or more sessions within a perspective. Factors that did not reach this threshold were eliminated. For example, it is the research team's assessment at this time that insufficient data is available to analyze integration factors by fixed and mobile site operations. Initial assessments indicate that data collection participants did not differentiate between the two; however, this will be reviewed further in

subsequent project tasks. All factors that met the standard were further assessed to determine if they were generally positive or negative factors. Similar to the above analyses, frequencies were run to determine the number of times each factor was identified as a facilitator or inhibitor. Relative percentages were also computed. Data were analyzed across all teams/units and within team/unit. Appendix B contains a listing of critical integration factors identified through the content analysis with full definitions.

RESULTS

Analyses determined the prevalence and relative importance placed on each of the factors. The results indicated that the following five factors accounted for over 50% of the coded instances:

1. Supported unit recognition of MFT as a valuable War Fighting unit is critical (13% of all responses),
2. MFTs must be tactically sound and combat ready for full and successful integration to occur (12%),
3. A comprehensive MFT pre-deployment training program that leverages integrated, full-spectrum training opportunities is invaluable (11%),
4. Effective leadership from the supporting unit (i.e., MFT) is critical (11%), and
5. BfSB leadership should proactively support integration preparation (10%).

The top five factors demonstrate that it is important for units to recognize the value of MFTs as well as for the MFTs to recognize their dual role as a combat ready Soldier. Additionally, it is critical that leadership from both the supporting unit and the supported unit be integral in the integration process, which should start with an integrated pre-deployment training.

While there are some variances in the importance that each team/unit provided to each of the factors, there was agreement that both "Supported unit recognition of MFT as a valuable War Fighting unit is critical" and "MFTs must be tactically sound and combat ready for full and successful integration to occur" are important for integration (i.e., both statements ranked in the top five among all perspectives). Refer to Table 2 for the complete results. For a description of how the data collection factors relate to the literature review findings, see Table 5. Note the similarity to the factors found in the literature review. For example, themes related to strong leadership, e.g., clearly defining roles and responsibilities, vision sharing, understanding of unit cultural differences, open communication, trust, socialization, and proactive collaboration, were all factors documented in the literature.

Table 2

Frequencies (in percentages) of All Factors across All Teams/Units and Within Team/Unit

Factor	All	MFT	SOF	BCT	BfSB
1. Supported unit recognition of MFT as a valuable War Fighting unit is critical.	12.6	12.9	14.5	12.0	8.5
2. MFTs must be tactically sound and combat ready for full and successful integration to occur.	11.7	12.9	10.8	12.7	10.6
3. A comprehensive MFT pre-deployment training program that leverages integrated, full-spectrum training opportunities is invaluable.	11.0	11.3	12.4	8.2	10.1
4. Effective leadership from the supporting unit (i.e., MFT) is critical.	10.9	9.9	13.5	7.0	10.6
5. BfSB leadership should proactively support integration preparation.	10.2	7.6	12.1	10.1	10.6
6. MFT should be proactive in building relationships with the supported unit.	9.4	10.6	9.0	9.5	8.5
7. Standard Operating Procedures, Roles and Responsibilities of MFT and Supported Unit must be defined and then clearly understood.	7.6	11.3	4.7	6.3	8.5
8. Initial MFT capabilities presentation is essential.	7.5	8.3	6.1	8.9	12.0
9. BfSB leaders should promote value of MFT.	7.4	3.6	13.2	5.7	4.3
10. Command relationships are important but they should not drive mission.	4.0	4.0	3.7	7.0	2.1
11. Integration efforts are most successful when they are pervasive down range.	2.8	1.3	0.0	5.7	4.8
12. MFT should proactively seek high-profile missions to build trust with supported unit and deliver on stated analysis capabilities.	1.9	1.7	0.0	1.9	5.9
13. Operational security and clearance issues are factors during integration.	1.8	4.0	0.0	4.4	3.7
14. After the MFT and Supported Unit have integrated, they should continue to reflect, assess, and adapt.	1.3	1.7	0.0	0.6	3.7

Across all perspectives, factors were more likely to be identified as a facilitator, with the exception of two factors. These factors were "A comprehensive MFT pre-deployment training program that leverages integrated, full-spectrum training opportunities is invaluable" and "BfSB leadership should proactively support integration preparation." When examining these data by perspective, MFTs were much more likely to refer to the factors as inhibitors than other perspectives. Appendix C provides the relative frequencies of each factor identified as a facilitator or an inhibitor across all perspectives.

Finally, to provide a holistic perspective of the results, a heat map was created and is included in Table 3. The heat map visually portrays the relative importance of each factor as well as whether each factor was more likely to be identified as a facilitator or inhibitor. These

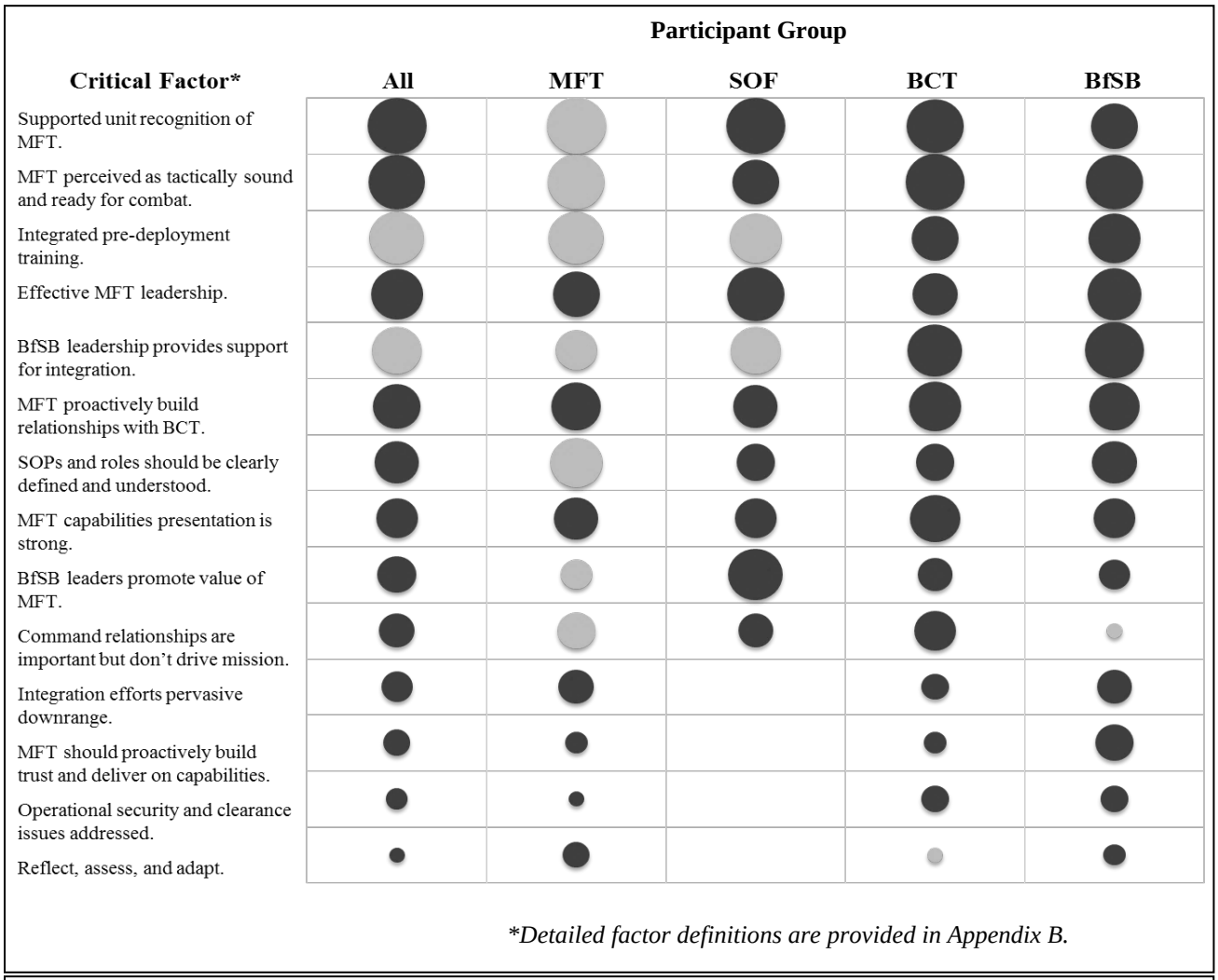
elements are represented by the size and the color of the bubbles. Bubble size corresponds to the relative frequency in which a factor was identified as critical in the analysis (larger bubble = more critical). Bubble color signifies whether the factor was generally identified as a facilitator or inhibitor. Dark gray bubbles indicate the factor was coded as a facilitator in more than 60% of the cases. Light gray bubbles indicate the factor was referred to as a facilitator in less than 40% of coding.

It is interesting to note differences in participant perspective when reviewing the heat map. While there was general agreement in factor criticality levels, there were sometimes important differences in whether the factor was viewed as an integration facilitator or inhibitor. For example, all participants – MFT, SOF, BCT, and BfSB—indicated that 'supported unit recognition of the MFT unit' is critical, underscoring that team success hinges on building strong relationships with the supported unit. However, while SOF, BCT, and BfSB Soldiers noted this factor is generally achievable and should assist MFTs during integration (i.e., dark gray, factor is a facilitator), MFTs reported this factor as important but often difficult to attain (i.e., light gray, factor is an inhibitor). Similarly, all participants indicated 'SOPs and roles should be clearly understood' but only MFTs described this as an integration inhibitor.

These findings presented in Table 3 demonstrate that MFTs are sometimes attempting to overcome integration challenges that their counterparts do not see as an issue. For instance, while BCTs and BfSBs believe specialized team capabilities are typically leveraged properly, MFTs convey that their counterparts often do not understand their team's role and/or overlook SOPs during integration. Likewise, where SOF teams are able to establish supported unit relationships and SOPs, MFTs are challenged to bridge these gaps. This all suggests that MFTs must be proactive during the integration process so the supported unit will invest in the integration process as well. MFTs must convince supported unit leaders that there is more to learn about MFT capabilities, demonstrate how the team can support a mission, and describe the added value the team brings to the battlefield. Mutual, proactive engagement will help to ensure MFTs are fully integrated, understood, and maximized.

Table 3

Graphic representation of factor criticality



**Detailed factor definitions are provided in Appendix B.*

Legend

Bubble Size = Larger bubbles indicate higher criticality
Dark gray = Group reported factor as critical and when present, a facilitator during integration
Light gray = Group reported factor as critical but based on experience, typically not present.

TOOL DEVELOPMENT

A set of integration tools were then developed for enabling/improving the rapid integration of MFTs into the maneuver unit's organization and mission set. This includes the development of a set of resources that would improve commander and staff understanding of MFT capability and utility, as well as a means to communicate MFTs' abilities, strengths, and

competencies. To accomplish this, the team facilitated an Integration Tool Selection and Design Workshop and created an MFT Quad Chart and Smart Card.

Integration Tool Selection and Design Workshop

A full-day workshop with Army Subject Matter Experts (SMEs) was conducted to identify and select prototype integration tools. The workshop leveraged the findings of the critical integration factors identified in previous project phases into a set of resources that would enhance a MI MFT's assimilation into a BCT. The Joint Readiness Training Center (JRTC) at Fort Polk, LA, hosted the tool selection and design workshop.

Twenty-four Observer, Coach, Trainers (OCTs) participated in the workshop. OCT duties include observe unit performance, control engagements and operations, teach doctrine, coach to improve unit performance, monitor safety, and conduct professional after action reviews (AARs). OCTs are required to have successfully performed the duties of their counterparts and to be well versed in current operational doctrine and tactics, techniques, and procedures (TTP). The participants included experienced OCTs from each JRTC Battalion Task Force Team, the Intelligence group, the Special Operations Training Detachment, the Fire Support Division, and the Brigade Mission Command unit. The OCTs had experience and expertise related to specialized team integration across a wide range of situations from both BCT and external team member perspectives. An overview of participant ranks is provided in Table 4.

Table 4

Perspective by Rank of JRTC OCT Participants

	SFC	**MSG/ 1SG**	**CPT**	**MAJ**	**WO1**	**CW2**	**Total**
Battalion Task Force	3	3		4			**10**
Intelligence	1	1		1		1	**4**
Special Operations	1	1	1	1	1		**5**
Fire Support	1	1	1				**3**
BCT Operations	1			1			**2**
Total							**24**

The workshop was designed to familiarize participants with the project research findings to date, to validate the critical integration factors identified, and to facilitate the selection and design of prototype team integration tools. Participants were instructed that the research focus was the integration of an MFT but the results were also expected to have implications for the integration of specialized teams in general.

Prior to the workshop, OCT participants were provided with read-ahead materials consisting of a two-page advance sheet, an overview of the research and a summary of workshop objectives, along with the Literature Review and Data Collection finding chapters from the previous phases of the research. These materials oriented the OCTs to the purpose the workshop and key research findings. Each OCT was also asked to bring a copy or example of an effective

and targeted tool from their OCT 'toolbox' to briefly explain and share during the session. The tools could relate to any topic or subject but needed to be focused on aiding or improving team or unit performance on a specific task or set of related tasks. The purpose of this assignment was to have the OCT begin thinking about what makes an effective integration tool.

The full-day workshop presented the 14 factors previously identified as critical to integration. All 14 factors and their relative importance were vetted through facilitated group discussion with the OCTs. Once the OCTs indicated an understanding of the factors and the importance of each, they were asked to provide a short description of a possible integration method or tool for improving team integration. These initial discussions resulted in the OCTs having a deeper understanding of research objectives and a shared awareness of potential tool options for further assessment during subsequent workshop sessions.

The next portion of the workshop involved organizing the OCTs into small groups to brainstorm potential tools that could be created by the research team to facilitate MFT integration. The groups were asked to consider their personal integration experiences; best practices from JRTC; the research findings presented; MFT capabilities, task organization and equipment; as well as any lessons-learned from Iraq (Operation Iraqi Freedom/Operation New Dawn) and Afghanistan (Operation Enduring Freedom). Finally, the groups were asked to develop a tool outline to be used to report back in the larger group. Each group's outline included:

- Type of proposed tool selected by group.
- Target user(s) and audience for the proposed tool.
- Key design characteristics of the proposed tool.
- Example use(s) of the proposed tool.
- Description of how the tool improves MFT integration.
- Identification of limitations or drawbacks of the tool.
- Description of level of effort and resources needed to create completed tool.
- Description of small group agreement on the tool recommendation; any dissenting voices.

This process resulted in the preliminary development of the following three integration tool options.

1. MFT Quadrant Chart (i.e., Quad Chart),
2. MFT Smartcard, and
3. MFT planning checklist

The proposed MFT Quadrant Chart (i.e., Quad Chart) would be a Commander centric tool that could serve as the foundation for a scalable briefing by providing example content and guidance to tailor for a specific integration event. The chart would include and provide guidance for MFT leaders to describe MFT task and purpose embedded within the supported unit mission. In addition, the Quad Chart could detail MFT capabilities and requirements and offer tailored recommendations for MFT employment.

The MFT Smartcard could be used to promote universal understanding of MFT benefits within MFTs themselves and within BCTs. This resource was envisioned as a pocket-sized handout with global, bulleted MFT information. The Smartcard could also highlight pertinent MFT capabilities such as modified table of organizational equipment (MTOE), roles, targeting cycle, equipment, employment, and benefits.

The MFT planning checklist would be a tool that could provide a step-by-step overview for an MFT Commander to follow to ensure the integration process is successful. The checklist could include items needed from the supported unit such as the operations order (OPORD) or fragmentary orders (FRAGOs), mission statement, priority intelligence requirements (PIR), and include any doctrinal-based tasks the MFT Commander must consider before and during integration.

During the last segment of the workshop, all participants discussed the three tool options. It was decided that a hybrid tool set that incorporated components of the both the MFT Quad Chart and Smartcard would be the best product. The combined tools offer MFTs and their leaders with a valuable set of resources that can be used during the integration process to address many of the critical integration factors uncovered during the initial phases of this research. An overview of these complimentary tools, the MFT Quad Chart and Smartcard, is provided in the next section. The MFT Planning Checklist was deemed valuable but recommended for consideration in a future project since it is a resource MFT leaders would use *before* integration rather than during the integration effort itself.

Creation of MFT Quad Chart and Smart Card

Tool design characteristics and tool content needed to be defined and developed based on workshop results. This process involved leveraging research team expertise, reviewing example tools provided by workshop participants, and analyzing applicable source documents including:

- Training and Doctrine Pam 525-3-0, The U.S. Army Capstone Concept (2012)
- Army Doctrine Reference Publication 3-0 Unified Land Operations (2012a)
- Army Doctrine Reference Publication 2-0 Intelligence (August 2012d)
- Field Manual 3-55.1 Battlefield Surveillance Brigade (BfSB) (June 2010)

Based on this analysis, a series of prototype tools were created, reviewed, and refined with the goal of creating the final MFT integration resources.

The iterative evaluation and modification allowed for the development of tools that met MFT integration needs. The full MFT Quad Chart and Smart Card were designed to be tailored and scaled to assist the MFT Team Leader and Team Sergeant during the integration process. Portions of the tools were designed to provide a quick reference for MFT members. The full tools provide a menu of options that can be tailored to the operational environment. When used in unison, the complementary tools allow the MFT leader to clearly convey the team's capabilities and requirements while also describing how the MFT enhances the supported unit's ability to achieve its mission.

Specifically, the MFT Quad Chart is designed to set the conditions for successful integration by giving the BCT senior leadership a macro-level understanding of the MFT. The target audience for the Quad Chart is the BCT Command Group and is based on the assumption there may be limited time to deliver a full MFT capabilities brief to the Commander. Thus, the purpose of the Quad Chart is to explain key MFT capabilities in a condensed format. The MFT leader can expand the Quad Chart into a full MFT capabilities briefing to further educate key BCT staff members (e.g., S2/S3/S2X) on additional MFT capabilities and employment considerations. The Quad Chart format is familiar to senior members of the BCT Command elements and staff. The Smart Card is scalable based on the target audience, but more specifically focused on space, storage, and logistical requirements to facilitate integration. It can be used to orient BCT Staff, special staff and subordinate maneuver units. It may also be used electronically or portions can be printed out and distributed in hard copy.

Table 5 presents a synthesis of the data collection and literature review findings, in conjunction with a brief description of how the factors were incorporated into the tools.

Table 5

Synthesis of Findings across Data Collection, Literature Review, and Tool Development

Factor Identified in Data Collection	**Related Enabling Factors from Literature Review**	**Implementation of Factor in Tools**
Supported unit recognition of MFT as a valuable War Fighting unit is critical.	• Cultural understanding • Shared understanding and vision • Clear roles and responsibilities	• Quad Chart and Smart Card provide overview of MFT capabilities and examples of how team adds value to supported unit mission execution.
MFTs must be tactically sound and combat ready for full and successful integration to occur.	• Cultural understanding • Shared understanding & vision • Collaboration/participation • Socialization	• Quad chart demonstrates MFT leadership has researched supported unit needs and establishes how MFT can specifically add value through assignment(s).
A comprehensive MFT pre-deployment training program that leverages integrated, full-spectrum training opportunities is invaluable.	• Socialization • Open communication • Cohesion • Trust • Cultural understanding • Cooperation/coordination • Collaboration/participation	• When MFT leaders proactively implement Quad Chart and Smart Card as recommended, it provides opportunity for MFT to begin working with supported unit prior to deployment.
Effective leadership from the supporting unit (i.e., MFT) is critical.	• Strong leadership • Open communication	• Quad Chart offers MFT leaders resources and a framework to effectively communicate and begin coordination with supported unit.
BfSB leadership should proactively support integration preparation.	• Strong leadership • Socialization	• BfSB leaders can provide assignment specific and exemplary content for MFT leader to utilize within Quad Chart and Smart Card structures.

Factor Identified in Data Collection	Related Enabling Factors from Literature Review	Implementation of Factor in Tools
MFT should be proactive in building relationships with the supported unit.	• Socialization • Cohesion • Open communication • Trust	• Tools provide framework and instructions to allow MFTs to quickly summarize key capability detail and be proactive, even during compressed integration timeframes.
Standard Operating Procedures, Roles and Responsibilities of MFT and Supported Unit must be defined and then clearly understood.	• Clear roles & responsibilities • Shared understanding & vision	• Quad Chart and Smart Card both describe the MFT's role, the team's responsibilities, and the resources needed from the supported unit.
Initial MFT capabilities presentation is essential.	• Shared understanding & vision • Trust • Clear roles & responsibilities	• Quad Chart serves as a best-practice capabilities briefing that MFT leaders can tailor to a specific integration event.
BfSB leaders should promote value of MFT.	• Strong leadership • Shared understanding & vision	• Smart Card, when used as marketing tool, provides structure for BfSB leadership to document MFT capabilities and provide synopsis to conventional force leadership.
Command relationships are important but they should not drive mission.	• Clear roles & responsibilities • Learning & adaptability	• Quad Chart is designed to allow MFT leader to proactively engage in bilateral communication with supported unit, rather than waiting for BCT to engage MFT.
Integration efforts are most successful when they are pervasive down range.	• Collaboration/participation • Learning & adaptability • Open communication • Socialization	• Quad Chart is flexible and designed to be tailored for each mission, allowing MFT to reuse the structure and example content downrange.
MFT should proactively seek high-profile missions to build trust with supported unit and deliver on stated analysis capabilities.	• Trust • Collaboration/participation	• Quad Chart provides appropriate method for MFT leaders to develop capabilities briefing and to describe how their unit could execute in high-profile missions.
Operational security and clearance issues are factors during integration.	• Cooperation/coordination • Trust	• Tools provide framework for MFT to describe all security and clearance considerations.
After the MFT and Supported Unit have integrated, they should continue to reflect, assess, and adapt.	• Reflection/assessment • Learning & adaptability • Knowledge management	• Quad Chart briefing content can be revisited after mission execution to assess MFT and supported unit actual performance in comparison with envisioned responsibilities as described in MFT capabilities briefing.

FORMATIVE EVALUATION

The goal of the formative evaluation was to assess the effectiveness of the two integration tools developed (i.e., Quad Chart Briefing and Smart Card) in supporting specialized team integration into CF operations and the extent to which they addressed the critical integration factors identified earlier in the research. The evaluation was conducted in collaboration with the JRTC Operations Group.

For the formative evaluation, a group of experienced SMEs conducted the evaluation of the tools in a realistic situation across unified land operations (ULO). Data collection was iterative, systematic, and 'in the moment' during tool use, adding to its worth. The evaluation centered on a 14-day BCT JRTC training rotation. The training rotation consisted of a Decisive Action Training Environment (DATE) exercise with an emphasis on joint forcible entry; combined arms maneuver (CAM), noncombatant evacuation operations (NEO), and unconventional warfare in a Joint, Interagency, Intergovernmental, and Multinational (JIIM) environment.

An observational rating form was developed with 14 items representing each of the 14 critical integration factors. Each item used a 5-point Likert scale ranging from 5- Very Effective to 1- Very ineffective. OCT participants were instructed to rate the tools separately using this scale based on their perception of the tool structure and their evaluation of 'live' tool implementation by MICOs during the rotation.

Consistent with previous data collections, all participants in the formative evaluation were briefed on the purpose of the tools and provided an opportunity to have their questions answered concerning the tool use and evaluation during the JRTC rotation. The difference was that the OCTs were actually observing the tool 'in use' and providing their feedback on the tools in real time during the realistic training conditions of a JRTC unit rotation. This rotation tested the unit under unified land operations conditions as well as counterinsurgency (COIN) operations. OCT feedback on the tools addressed their use across all aspects of the different mission sets. Eight OCTs participated in the evaluation by interacting directly with the MICOs and collecting evaluation data.

The formative evaluation occurred in three phases over separate visits to JRTC. In Phase 1, the research team attended the pre-rotation Operations Group MI planning session, the "MI Laydown." At the end of the Laydown, JRTC OCTs were provided with an orientation to the research, the two integration tools, the evaluation data collection instrument, and a discussion of their role in the research. The OCT objective was to implement the tools during the rotation by working with the MICO commander. This involved planning for the use of the tools, adapting the tools to the situation, and developing tailored tool content.

After working with the MICO commanders to tailor the integration tools, the OCTs were asked to observe and record when and how the tools were implemented through use of the data collection instrument. In total, six MICO commanders were observed who also received input and assistance from their platoon leaders and platoon sergeants in the finalization of the tools for their specific purposes. Updating the tool occurred one to two days before the integration event.

Tools were used during the first meeting with the support unit and then throughout the event as additional detail about the MICO's capabilities needed to be shared. The data collection instrument also required OCTs to evaluate each tool's use and functionality as well as its effectiveness in addressing the 14 critical integration factors previously identified. The full formative evaluation data collection instrument is provided as Appendix D.

Phase 2 occurred two weeks into the exercise. Completed data sheets were collected from participating OCTs, and fresh materials were provided for the final mission set. This second phase provided an opportunity to informally collect lessons learned on tool implementation during the first half of the rotation. Phase 3 was conducted immediately after the entire training rotation was completed. This phase involved the facilitation of a qualitative and quantitative focus group with the eight participating OCTs. The focus group purpose was to discuss each data collection instrument item as a group and to gather additional detail related to the evaluation of the tools. Summary results from all phases are provided below.

Formative Evaluation Results

Tables 6 and 7 provide mean ratings and standard deviations by factor for the Quad Chart and Smart Card, respectively. The rating items listed in each table correspond to the questions on page 2 of the data collection instrument (Appendix D).

Table 6

Quad Chart: Mean Ratings and Standard Deviations (SD) of Tool Effectiveness for 14 Critical Integration Factors

Quad Chart Formative Evaluation Item	Mean	SD
1. Assisting the team leader in being effective during the integration process.	4.67	0.52
2. Facilitating the team's development of a capabilities briefing for the supported unit.	4.50	0.55
3. Contributing to the supported unit's recognition of the team as a valuable War Fighting unit	4.50	0.84
4. Promoting the value of the team to supported unit.	4.50	0.55
5. Starting an integration process that allows the team and supported unit to continue to reflect, assess, and adapt.	4.17	0.75
6. Supporting the overall integration process as envisioned and promoted by the team's senior leaders.	4.00	0.89
7. Identifying operational security and clearance issues to be considered during integration.	3.83	0.75
8. Assisting the team in proactively building relationships with the supported unit.	3.67	0.82
9. Starting an integration process that can be pervasive down range.	3.67	0.82
10. Allowing the supported unit and team to better understand each other's SOPs, roles, requirements, and responsibilities.	3.67	0.82
11. Contributing to a pre-deployment training program that leverages integrated, full-spectrum training.	3.50	0.84
12. Assisting in the appropriate delineation of command relationships for the target mission.	3.50	0.84
13. Assisting the team in gaining high-profile missions that build trust with supported unit so team can deliver on stated analysis capabilities.	3.33	0.52
14. Contributing to the team being tactically sound and combat ready so successful integration can occur.	3.17	1.17

Table 7

Smart Card: Mean Ratings and Standard Deviations of Tool for 14 Critical Integration Factors

Smart Card Formative Evaluation Item	Mean	SD
1. Facilitating the team's development of a capabilities briefing for the supported unit.	4.75	0.50
2. Assisting the team leader in being effective during the integration process.	4.75	0.50
3. Contributing to the supported unit's recognition of the team as a valuable War Fighting unit	4.50	1.00
4. Promoting the value of the team to supported unit.	4.50	0.58
5. Starting an integration process that can be pervasive down range.	4.50	0.58
6. Assisting the team in proactively building relationships with the supported unit.	4.00	0.82
7. Allowing the supported unit and team to better understand each other's SOPs, roles, requirements, and responsibilities.	4.00	0.82
8. Contributing to a pre-deployment training program that leverages integrated, full-spectrum training.	3.75	0.96
9. Supporting the overall integration process as envisioned and promoted by the team's senior leaders.	3.75	0.50
10. Identifying operational security and clearance issues to be considered during integration.	3.75	0.96
11. Assisting in the appropriate delineation of command relationships for the target mission.	3.75	0.96
12. Starting an integration process that allows the team and supported unit to continue to reflect, assess, and adapt.	3.75	0.96
13. Assisting the team in gaining high-profile missions that build trust with supported unit so team can deliver on stated analysis capabilities.	3.50	0.58
14. Contributing to the team being tactically sound and combat ready so successful integration can occur.	3.00	1.41

Results revealed that both tools were considered valuable resources during the integration of specialized teams into larger supported units with mean ratings of 3 or greater across all items. The analyses also indicated the tools to be most effective in:

- QUAD Chart
  - Facilitating the team's development of a capabilities briefing for the supported unit,
  - Supporting the overall integration process as envisioned and promoted by the team's senior leaders,
  - Contributing to the supported unit's recognition of the team as a valuable War Fighting unit;
  -
- Smart Card
  - Assisting the team leader in being effective during the integration process,
  - Promoting the value of the team to supported unit,
  - Starting an integration process that allows the team and supported unit to continue to reflect, assess, and adapt.

As expected, the tools were rated as less effective in:

- Contributing to the team being tactically sound and combat ready so successful integration can occur,
- Assisting the team in gaining high-profile missions that build trust with supported unit so team can deliver on stated analysis capabilities.

Results of the Qualitative Analyses

Qualitative data were collected throughout all phases of the evaluation. Due to the realistic nature and high operations tempo of the training event, it was not possible for the research team to interact with MICO commanders directly. OCT data collectors were asked to describe the event(s) where the teams used the tool to facilitate their team's integration, indicate how the conventional BCT/Battalion (BN)/Company (CO) Soldiers reacted to the team's use of the tool, and rate each tool on its effectiveness in facilitating integration. The participants were also instructed to list attributes, characteristics, or components of the tool that made it particularly effective while describing any features that created a negative impression or outcome. Lastly, they were required to generally describe aspects of the tool that should be sustained and/or changed.

At the conclusion of the evaluation, responses were analyzed to summarize participant feedback across all phases and compared to results of the previous data collections (i.e., literature review, qualitative data collection, OCT Workshop). Themes were then organized into two evaluation categories: Tool Functionality and Tool Usage. 'Functionality' refers to the standalone design and structure of the tools while 'Usage' refers to the employment and application of the tools during an integration event. An overview of results is provided below.

Evaluation of tool functionality. The following themes emerged in relation to tool functionality:

- Valuable resource for enhancing the integration process. Formative evaluation participants indicated tool structure and content were of great value to junior team leaders as originally indicated in the OCT tool development workshop.
- Well designed for MFTs with valuable best-practice and example content. The tools have direct applicability to other related teams; however, the tools need to be further customized for each type of MI asset.
- Ideal fit for bottom up/intelligence-driven operations (COIN scenario). OCTs indicated that tools fit well in COIN operations where MI assets have a key role in mission planning and lethal/non-lethal targeting operations.
- Quad Chart is more conducive to in-the-mission use while Smart Card is better used during mission prep/training at home station (unless the MI asset is new or different). This was consistent with the goals described in the tool development workshop. It should be noted that participants added pending changes to MI asset organization will increase the need for capabilities statements until conventional units become familiar with them.
- Designed to function at multiple levels of conventional unit integration. Participants indicated the tools offer appropriate guidance and flexibility to MFT leaders in

developing capabilities briefings. The tools provide supporting information for slides across strategic, operational and tactical intelligence levels dealing with collection, analysis, and integration of intelligence into other warfighting functions (e.g., fires). Supporting slides also provide varying levels of detail that may be used depending on the conventional unit familiarity with the integrating specialized team.

- Information and supporting documents must be tailored to that level of command and/or unit integration. All users should understand the need to tailor and use only the supporting slides needed. Slide selection should be based on the level of the command/unit and the gaining unit familiarity with the integrating specialized team capabilities.

Evaluation of Tool Usage. The following themes emerged in relation to tool usage:

- Tools must be introduced early in integration processes so team leaders have time to tailor the content. Teams should start updating the tools before arriving to the BCT. Proactive, open communication was identified as an important concern during the literature review and interviews.
- The atmosphere of the BCT command influences specialized team integration. BCT command culture may not immediately accept the integrating team which limits the input especially during time sensitive missions. This was a finding during the qualitative data collection. Well-developed and up-to-date tools may assist in overcoming this obstacle; however, there is a need for proactive and strong specialized team leaders.
- Tools should be customized for every integration event. While the tools provide the structure and example content for a given specialized team (i.e., MFT), they can and should be customized for use with multiple types of small teams.
- Differentiate between the tools themselves and the supporting documents. Upon initial viewing of the tools, some individuals thought the tools included the supporting slides and information. The tools were redesigned to clearly identify what portions are supporting documents and slides to eliminate confusion.

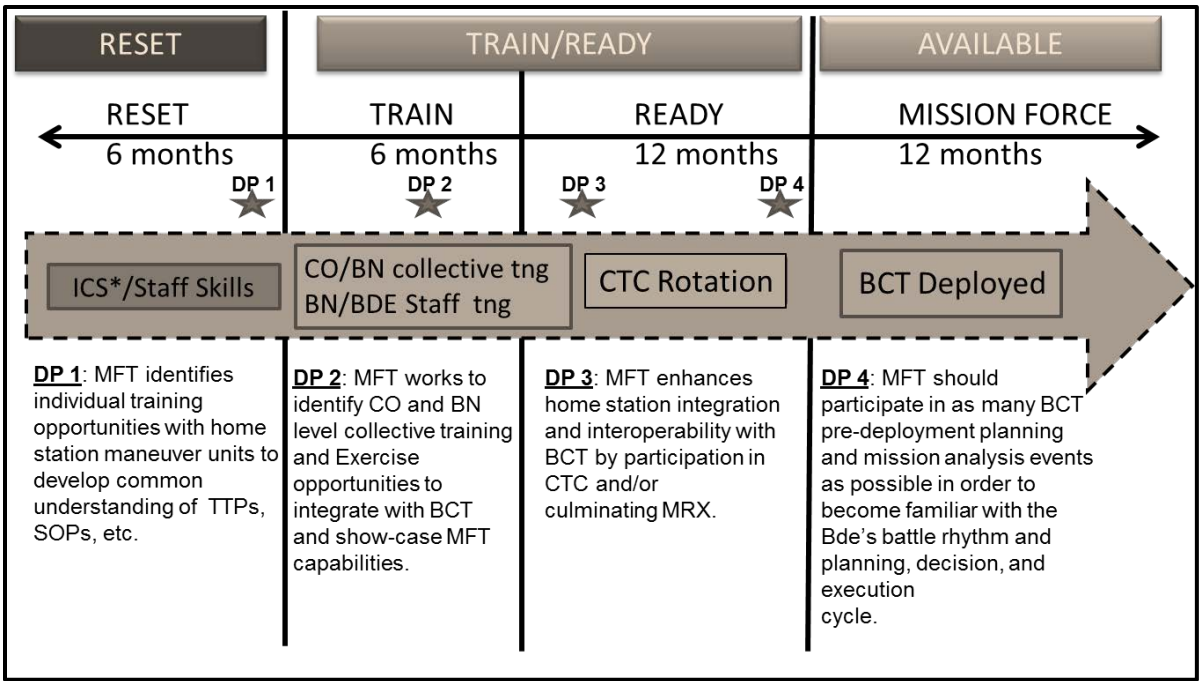
In sum, the formative evaluation findings provided critical information for refinement of the tool designs.

Finalization of the Tools

Specific feedback was used to finalize the layout of the tools, better differentiate and explain supporting example documentation, as well as refine the instructions provided to the users of the tools. A primary focus of the changes was to provide greater instruction to team leaders regarding tool usage. For example, integration and interoperability is a continuous progression that should begin as early as possible in the ARFORGEN process. This suggests any specialized team should identify additional opportunities such as internal training events, commander's conferences, and Quarterly Training Briefs (QTBs) to begin the integration process. Based on the evaluation results greater emphasis should be provided to assist the specialized team in understanding how to best adapt the tool. Table 8 provides an overview of recommended key integration targets.

Table 8

Recommended Specialized Team Integration Opportunities during BCT ARFORGEN, MFT example.



Finally Appendix E provides greater detail related to the key feedback themes which emerged during the formative evaluation and from the SME review of the integration tools. The chart provides the themes and the final actions in updating the tools. The action items correspond to each feedback point.

CONCLUSIONS

Integration of any external specialized team with the standard BCT organizational structure is a challenge for both the specialized team and gaining BCT. The special operations force, considered by many to have the best understood capability, struggled to accomplish successful integration in both the Iraq and Afghanistan OEs. The integration difficulties led to the publication of a joint service regulation on SOF teams' integration with conventional formations across all services. As such, less understood specialized teams require similar efforts to more effectively integrate with the supported BCT.

The research findings provide some explanation for the integration challenges. The literature provided a categorical list of factors impacting successful integration to include the inhibiting factors. Using these factors as the baseline along with the results from the interviews and formative evaluation, these factors were prioritized and used to develop two tools that may impact specialized teams' integration effectiveness. The tools were designed based on the research findings highlighting the need to address two key integration challenges: (1) the

specialized team's preparation for integration, and (2) the development of concise capabilities information on the value of the specialized team to the gaining unit.

Specialized team preparation appears to center on the team's warrior skills preparation. The findings from the focus group interviews and the formative evaluation indicate successful BCT integration depends on a demonstration of a specialized team's adaptability and capability to seamlessly integrate with the BCT Soldier mission. Understandably this is difficult to achieve if limited contact with the gaining BCT occurs during the trained and ready phase of the ARFORGEN cycle. Solders and leaders identified that early contact with the BCT to include staff and unit exercise participation would facilitate early integration of any small team with the BCT. The development of the Smart Card to include the initial capabilities brief could be used to build on any initial success achieved during training or to identify integration barriers yet to be addressed. Both products would support Soldiers in maximizing effective integration.

Achieving effective integration and interoperability is a challenge faced by many of the specialized teams that the Army has designed to add enhanced capabilities to BCT/CF units. As the MI MFT was the focus for a demonstration of how these tools could be developed and employed, further research could be undertaken to apply the findings to other specialized teams. For example, evaluation participants acknowledged the value of the MFT Integration Tools and recommended the development of fully customized integration tools for other MI specialized teams such as SIGINT, CI, and HUMINT teams. More broadly, evaluation results indicated that generalizing the MFT integration tools for use by specialized teams across the Army (e.g. Explosive Ordinance Disposal (EOD), Civil Affairs (CA), etc.) would be of benefit. Such adaptation of the existing tools would most likely require reviews by subject matter experts drawn from a sample of specialized teams across the Army.

Additionally, observations during the formative evaluation highlighted how influential the Commander and command climate were for creating the conditions for successful specialized team integration. Similar tools developed for the BCT/CF commander and staff might further promote integration. One focus could be on developing processes and tools that would support the BCT commander in allowing the perspective of the specialized team leadership to be heard and incorporated into BCT/CF operational planning and execution.

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Appendix A: DATA COLLECTION INTERVIEW PROTOCOL

1. Introduction & Research Purpose

Good morning/good afternoon and thank you for taking the time to participate today. My name is _____ and this is my colleague, _____. The conflicts in Iraq and Afghanistan brought renewed attention to the integration and synchronization of special operations forces (SOF) and military intelligence (MI) assets with conventional forces and the Brigade Combat Team (BCT) in particular. Our team is conducting a research project to identify the critical factors to be addressed when integrating small specialized teams into conventional units, using the integration of Multi-Functional Teams (MFT) as an exemplar. Results will be used to develop and evaluate a prototype training method or tool designed to enhance integration. As part of this endeavor, we are interviewing Subject Matter Experts, such as yourself, to learn more about the conditions influencing effective integration of small teams (e.g., SOF teams, MFTs) into the Conventional Force (CF) and opportunities to improve integration.

During today's session we'll be discussing topics such as:

1. Challenges with the integration of small teams into the CF.
2. Factors that influence the success and efficiency of team integration
3. Training methods and tools that would be useful toward improving integration.

The (interview/focus group) session will take approximately 90 minutes to complete.

2. Privacy Act Statement & Consent Form

Please note that your participation is voluntary – there are no consequences if you choose not to participate. Everything you say will remain confidential. We will be transcribing your responses on a laptop, but our analysis and reporting of your responses will be at the group or aggregate level—not at the individual level. In addition, each participant will be assigned an alpha numeric study code prior to the start of the interview/focus group so that participants can be linked to their responses without disclosing their identity. This will prevent anyone who may view the data after the data collection from determining the participant's identity.

To more fully explain the confidentiality process and how we will be using the information you provide today, I have a privacy statement and consent form for you to read over. Please take a few minutes to read over both documents. If you choose to participate, please sign the second page of the consent form and indicate that you are over 18 years old and are voluntarily agreeing to participate (*Have them sign the digital recorder block as well if applicable).* Please let me know if you have any questions about the privacy statement, consent form, or the session today. *Once you have signed your form, please return the signed page to me. You may keep the remainder of the document and the summary provided by the privacy act statement for your records and later reference.*

Do you have any questions for me at this time? (*Answer any questions that may arise*).

3. Demographic Worksheet & Questionnaire (Handout Separately)

1. Type of Unit (Please select one):

- ☐ Infantry BCT
- ☐ Heavy BCT
- ☐ Stryker BCT
- ☐ Combat Aviation Brigade
- ☐ Maneuver Enhancement Brigade
- ☐ Sustainment Brigade
- ☐ Fires Brigade
- ☐ Battlefield Surveillance Brigade
- ☐ Air and Missile Defense Brigade
- ☐ Engineer Brigade
- ☐ Explosive Ordnance Brigade
- ☐ Intelligence Brigade
- ☐ Military Police Brigade
- ☐ Signal Brigade
- ☐ CBRN Brigade
- ☐ Medical Brigade
- ☐ Provisional Reconstruction Team
- ☐ Special Forces Group
- ☐ Ranger Regiment
- ☐ Civil Affairs Brigade
- ☐ Other: _____

2. Echelon/Unit level (Please select one):

- ☐ Brigade
- ☐ Battalion
- ☐ Company
- ☐ Platoon
- ☐ SF A Team
- ☐ Squad
- ☐ Section

3. Rank (Please select one):

- ☐ E1
- ☐ E2
- ☐ E3
- ☐ E4
- ☐ E5
- ☐ E6
- ☐ E7
- ☐ E8
- ☐ E9
- ☐ O1
- ☐ O2
- ☐ O3
- ☐ O4
- ☐ O5
- ☐ O6
- ☐ O7
- ☐ O8
- ☐ O9

4. Position/Function/Assignment (Please select one):

- ☐ Commander
- ☐ Executive Officer
- ☐ Command Sergeant Major
- ☐ Operations (S-3) Staff
- ☐ Intelligence (S-2) Staff
- ☐ First Sergeant
- ☐ Leader
- ☐ Multi-Functional Team (MFT)
- ☐ Other (No acronyms): _____

4. Understanding of Integration in the OE

The Army must effectively prepare Soldiers, leaders, and units to operate and succeed in an uncertain operational environment (OE). Integration of special operations forces (SOF) teams and military intelligence (MI) assets with conventional forces (CF) is an area of critical focus. In this section, we are gathering information about team synchronization and the factors that influence integration.

1. Please describe a situation in the OE where a SOF team or MFT had to integrate with a conventional unit. You can describe a personal experience or a typical example.
    a. Can you further describe the context?
    b. What was the conventional unit's overarching mission?
    c. What was the SOF team/MFT's supporting mission?
    d. Was the conventional unit in a fixed site (FOB) or mobile command post situation?
    e. Would you characterize the integration successful or unsuccessful?
        i. Why or why not?
        ii. What factors and actions most contributed to successful integration?
        iii. What factors and actions most contributed to the lack of success in the integration?
    f. What actual impact did the outcome of the integration effort have on mission accomplishment and the Soldiers that experienced it?

2. In situations of integrating a SOF or MFT team into a conventional unit, who (within either the conventional or SOF/MFT unit) has the most influence on the success or failure of the integration?
    a. What role does this individual (or individuals) play in the integration?
    b. Why are these roles important?
    c. Are there specific factors that influence whether this (or these) individuals are successful?

3. To what extent are integrated (between the conventional unit and the SOF/MFT team) training, exercises and rehearsals important to effective specialized team integration?
    a. What training/exercise features best facilitate integration?
    b. How often and frequent should integrated training to be conducted?
    c. What are the major drivers of success for integrated training opportunities?
    d. What are the major barriers or obstacles to integrated training?

4. Does SOF/MFT specialized team integration differ or remain essentially the same for when a conventional unit is in a fixed site (FOB) versus a mobile command post situation?
    a. What factors are the same in either FOB or mobile command post situations?

    b. What factors are different in either FOB or mobile command post operations?

5. Many specialized teams are required to integrate with conventional units. Is there anything unique or different about a Military Intelligence Multi-Functional Team (MFT) that makes its integration particularly challenging?

6. During SOF/MFT integration, how is information initially communicated and shared about assignments, mission and capabilities between the team and the conventional unit?
    a. Are there on-going processes in place to share information throughout the integration?
    b. What factors facilitate good communication?
    c. What factors negatively impact communication?

7. In what ways does the culture and structure of the team or unit impact synchronization?
    a. How does the leadership of the team and/or unit impact integration?
    b. Are there certain cultures or structures that integrate better than others?
    c. Are there certain cultures or structures that do not integrate well?
    d. How does the capabilities & composition of the team or unit impact integration?
    e. How does the size of the team impact integration?

8. Please describe any other factors that positively and/or negatively influence integration of small specialized teams into conventional force units.

    a. How does length of time and/or experience in the OE impact integration?
    b. Does trust with other team and/or unit members affect integration?
    c. Does is make a difference whether the integration is occurring at a fixed site (FOB) vs. mobile command post?
    d. How does the timing of the integration impact synchronization? For example, does it matter if team integrates with the conventional force at the beginning, middle, or end of a mission?
    e. How do the additional factors you mentioned specifically impact integration?

9. Please describe how you would characterize full and successful integration.
    a. What conditions are typically present when complete synchronization has occurred?
    b. How long does full integration typically take?
    c. How do you know the integration has been a success?
    d. What types of pitfalls or conflicts arise when integration has not been successful?
    e. What is the impact of successful/unsuccessful integration on accomplishing the mission?

10. How could the synchronization of teams be made more efficient to ensure rapid integration?

    a. How could the initial assessments that commanders and leaders make be improved to ensure a comprehensive understanding of the MFTs capabilities?
    b. Are there ways to build trust quicker?
    c. What are the biggest challenges that tend to slow down the process of integration?

11. Please describe how the real world implementation of specialized SOF/MFT integration in the operational environment (OE) is different or the consistent with what is described in military doctrine or formal Army training.

12. If applicable, please discuss how your understanding and approach to team integration has evolved based on your OE experiences.

5. Ideas to Improve Specialized Team Integration, Training and Doctrine

Numerous conditions influence the assimilation and employment of small teams into BCT units. These variables impact commanders' and staffs' understanding of the utility, performance capabilities, and employment of the small team. The Army provides extensive guidance to manage team synchronization. In this section, we are gathering data to inform our recommendations related to improving integration training and guidance.

12. Please describe the elements of formal team integration training and/or doctrine that you remember most clearly.
    a. Why do these aspects of training stand out?
    b. Can you describe specific exercises or training examples that had a major impact on your understanding?

13. Are there particular team integration processes that transfer from training to the OE better than others? If so, please describe these processes.
    a. Why do you think these processes work well?

14. Please describe any aspects of formally trained specialized team integration Standard Operating Procedures (SOP), Tactics, Techniques and Procedures (TTPs) that tend to breakdown in the OE.
    a. How and when exactly do they breakdown?

15. How could current Army training, SOPs and/or TTP's be redesigned to improve the integration of specialty teams into conventional units?

    a. Are there ways to make it more realistic?
    b. Are there additional topics that need to be covered?
    c. What new strategies, tactics and/or procedures could be added to deal with the demands associated with integration?

16. Please describe any tools or job aids that would assist with team integration in the OE.

    a. Are there existing tools that could be used or improved upon? If so, what are they and how might they be updated?
    b. What new tools would you recommend that would improve specialized team integration into conventional forces?

17. In summary, what recommendations do you have for the improvement of MFT/SOF specialized team integration?

Conclusion

Your comments have been very helpful. Before we let you go, is there anything you would like to add or can you recommend any additional resources we should review related to the research purpose and topic?

Thank you again for your time and participation.

*Note: With slight modification for each type of unit and specific interview/focus group audience, this protocol is applicable to BCT, MI and SOF unit data collections.

APPENDIX B: Listing of Critical Integration Factors Identified through Content Analysis with Full Definitions

1. **MFT should be proactive in building relationships with the supported unit.** MFT success hinges on building strong relationships with the supported unit. Participants suggested the MFT should be proactive in establishing these connections. This may involve: sending representatives of the MFT (e.g., platoon leader, senior NCO) to key leaders within the supported unit to define expectations and make commitments; sharing of intelligence equipment and products, such as DIRs; and pushing to be included in mission planning. The connections of soldiers laying out abilities and managing expectations are critical to mission success. Additionally, social interactions can take place to acquaint the two units and build rapport. Because the MFT is a strategic asset that is employed at the tactical level, building relationships and rapport should occur at every level of the BCT and each member of the MFT has a critical role.

2. **A comprehensive MFT pre-deployment training program that leverages integrated, full-spectrum training opportunities is invaluable.** Attending integrated training prior to deployment (e.g., JRTC, NTC as Mission Rehearsal Exercises (MRX)) and during deployment (where possible) is a critical element in establishing rapport and communication requirements (e.g., S-2 reporting requirements, Battle Rhythm events). The training gives both units the opportunity to train and 'work out the kinks' for integration before operational assignment. Similar intra-unit training events were reported to be critical to SOFs' success. In instances where integrated training is not possible due to other takings, the MFT can send key members to function as liaison teams to exchange information and begin common understanding of capabilities, unit mission, and operational environment. Every attempt to establish a habitual relationship between the MFT and the supported Maneuver unit will result in a more seamless integration process. This pre-deployment training can be helpful to establish an environment of open communication, which was one of the most persistent themes emerging from the literature review. Through training, teams can begin establish cultures supporting inquiry and psychological safety so team members feel comfortable expressing their opinions and questioning how and why practices and procedures are in place.

3. **BfSB leadership should proactively support integration preparation.** BfSB leaders and staff should proactively support the MFT by maximizing training opportunities that enhance integration. This also involves minimizing distractions and taskings that degrade integration training opportunities. Additionally, the MFT would benefit greatly from a robust BfSB resourced Officer and NOC professional development program that focuses on operational art and joint planning procedures.

4. **Initial MFT capabilities presentation is essential.** MFT leaders must be articulate and confident in this briefing to gain the trust of BCT leadership because it can serve as a

marketing tool to increase the overall profile of MFTs. If BCT leadership does not fully understand MFT capabilities or feel confident the MFT can deliver, integration efforts will suffer. Trust, as suggested from the literature review, is particularly important so that teams feel they can count on one another to complete the mission. Implementing the principles of swift trust and encouraging perceptions of trustworthiness through the capabilities presentation can help to facilitate integration success. Additionally, MFT leaders need to be fully versed in the Joint, Interagency, Intergovernmental, and Multinational environment and the Find, Fix, Finish, Exploit, Analyze, and Disseminate (F3EAD) holistic targeting process. The capabilities presentation needs to include outline how the MFT enhances maneuver unit targeting and operations and include vignettes of MFT operational success.

5. **Supported unit recognition of MFT as a valuable War Fighting unit is critical.** Small specialized teams offer valuable capabilities to the CF force when they are used as a full team as intended. MFTs are designed to be a Time Sensitive Targeting asset specializing in exploitation of TSE/SIGINT/HUMINT on the Objective to gain follow-on target intelligence. MFTs provide maximum value to BCTs when used in this manner. Splitting up the MFT deludes the value of the team. Thus, it is important for the supported unit to recognize that the whole is greater than the sum of its parts and for the specialize team to clearly articulate its full capabilities while also delivering on them.

6. **MFTs must be tactically sound and combat ready for full and successful integration to occur.** MFTs that are not physically or mentally prepared for combat encounter difficulties integrating with conventional units because they are viewed as a liability in the OE. It is essential that MFTs are physically and mentally (e.g., understand typical assignments or culture of BCT) aware so they can speak the language and execute their tasks in concert with the supporting unit. As indicated from the literature review, cultural understanding is crucial when integrating two distinct cultures. Identifying and appreciating cultural differences through cross-company dialogue or culture clarification workshops can make a great difference in the success of integration. Additionally, the MFT supports a multitude of combat arms units (Heavy Armor, Mechanized Infantry, Airborne/Air Assault/Light Infantry, etc.) and therefore must be proficient in the varying TTPs in each of these units.

7. **Effective leadership from the supporting unit (i.e., MFT) is critical.** The MFT team leader must be able to influence leaders of the supported unit. The key role of these individuals is to identify the supported commander's CCIR/PIR/IR, realistically assess the services that the MFT could provide to support those CCIR/PIR/IR, and clearly and persuasively communicate to the supported unit's leader how their unit could meet the

supported unit's needs. This requires the leader to be proactive and to do some background work before beginning the integration process. The principle competency influencing key leader effectiveness is the ability to communicate effectively across echelons.

8. **BfSB leaders should promote value of MFT.** The BfSB leadership has been aggressive in seeking venues such as Warfighter and Commanders conferences to educate BCT leadership on BfSB capabilities and best practices for employing these capabilities. This process needs to be continued and reinforced by an overall BfSB/MFT education campaign that leverages Army lessons-learned cells at the Combat Training Centers, Pre-Command Course, etc.

9. **Integration efforts are most successful when they are pervasive down range.** MFTs who are integrated in supported unit communications and trainings reported greater synchronization. The integration process is holistic and there is not one method that will work in all situations—it is very dependent on the OE. MFTs housed in close proximity to supported unit report greater success. MFTs involved in pre-mission rehearsals and training report increased integration. MFTs involved in mission planning and debriefings reported stronger relationships with supported units.

10. **Operational security and clearance issues are factors during integration.** Most, if not all, MFT team members hold Top Secret/SCI clearances. MFT missions and equipment often involve TS/SCI compartmented capabilities and disciplines that are sensitive and on a need to know basis. If BCT leaders do not have TS/SCI clearance, it is difficult for MFT leaders to communicate their capabilities and objectives. This hurts relationship building between MFT and BCT as well as the integration process. The MFT overcomes this by employing finesse and establishing rapport with key players –both Commanders and Staff – in BCT. Additionally, the MFT needs to be co-located or in close proximity to the maneuver unit’s targeting cell in order to facilitate synchronization.

11. **Command relationships are important but they should not drive mission.** Due to high demand and low density of critical BfSB assets there are instances where putting specific collection capabilities forward with the maneuver units makes sense. The key is conducting the correct amount of planning and analysis to define the command relationship that best fits the mission and operational environment. The MFT command relationship needs to be thoroughly understood by both the MFT and the BCT because it may change as the fluidity of the battlefield changes. Command relationships are important but they should not drive the operation.

12. **Standard Operating Procedures, Roles and Responsibilities of MFT and Supported Unit must be defined and then clearly understood.** Integration is a process with consists of habitual relationships, technical and tactical proficiency, and well defined Army and Joint doctrine. Interviews indicated that there have been local attempts to develop an MFT handbook, SOPs, and exemplar capabilities briefings; however, MFT doctrine and training on how MFTs should integrate does not exist. This reality coupled with a general lack of knowledge of MFT capabilities at the BCT level can often hinder integration. Additionally, it is often the case that BCT leaders will have very different visions for MFTs. Clearly defined doctrine would lead to more rapid integrations.

13. **After the MFT and Supported Unit have integrated, they should continue to reflect, assess, and adapt.** Although planning how the MFT and Supported Unit will operate together is important at the onset of the integration, it is also necessary to continue reflecting on how the integration is working and how it can be adapted and improved. Results from the literature review suggested that reflection and assessment should occur on a continual basis, as it provides the opportunity for recognition of shortcomings and potential improvements. It serves as a primary feedback mechanism through which information is gained to evaluate the success of current and prior actions. The MFT and Supported Unit must then be willing to implement the identified improvements and adapt as needed to be effective in the long-term. Critical to this process is knowledge management. Knowledge management captures diverse knowledge by facilitating the creation, organization, sharing, and use of knowledge. When engaging in reflection and assessment, integrating teams can share knowledge between the teams to facilitate the application of lessons learned.

14. **MFT should proactively seek high-profile missions to build trust with supported unit and deliver on stated analysis capabilities.** BfSB, MFT, and BCT participants indicated that MFTs can build trust with supported unit by proactively seeking and volunteering for high profile assignments with supported unit. If MFT's can demonstrate capabilities on these initial assignments, their success will facilitate integration and opportunities in future missions.

APPENDIX C: RELATIVE FREQUENCIES (IN PERCENTAGES) OF EACH FACTOR IDENTIFIED AS A FACILITATOR AND INHIBITOR

Supported unit *recognition of MFT as a valuable* War Fighting unit is critical.

	All	MFT	SOF	BCT	BfSB
Facilitator	61.2	33.3	76.4	73.7	62.5
Inhibitor	38.8	66.7	23.6	26.3	37.5

MFTs must be *tactically sound and combat ready* for full and successful integration to occur.

	All	MFT	SOF	BCT	BfSB
Facilitator	61.7	38.5	70.7	85.0	65.0
Inhibitor	38.3	61.5	29.3	15.0	35.0

A comprehensive MFT *pre-deployment training* program that leverages *integrated, full-spectrum* training opportunities is invaluable.

	All	MFT	SOF	BCT	BfSB
Facilitator	45.1	35.3	27.7	92.3	73.7
Inhibitor	54.9	64.7	72.3	7.7	26.3

***Effective leadership from the supporting unit* (i.e., MFT) is critical.**

	All	MFT	SOF	BCT	BfSB
Facilitator	75.0	63.3	68.6	90.0	100.0
Inhibitor	25.0	36.7	31.4	10.0	0.0

***BfSB leadership should proactively support* integration preparation.**

	All	MFT	SOF	BCT	BfSB
Facilitator	39.0	17.4	26.1	56.3	80.0
Inhibitor	61.0	82.6	73.9	43.7	20.0

MFT should be *proactive in building relationships* with the supported unit.

	All	MFT	SOF	BCT	BfSB
Facilitator	77.3	68.8	82.4	60.0	100.0
Inhibitor	22.7	31.2	17.6	40.0	0.0

***Standard Operating Procedures, Roles and Responsibilities* of MFT and Supported Unit must be *defined* and then clearly understood.**

	All	MFT	SOF	BCT	BfSB
Facilitator	59.0	35.3	94.4	60.0	68.8
Inhibitor	41.0	64.7	5.6	40.0	31.2

Initial MFT *capabilities presentation* is essential.

	All	MFT	SOF	BCT	BfSB
Facilitator	77.9	56.0	91.3	85.7	86.7
Inhibitor	22.1	44.0	8.7	14.3	13.3

***BfSB leaders should promote value* of MFT.**

	All	MFT	SOF	BCT	BfSB
Facilitator	65.8	33.3	68.6	90.0	100.0
Inhibitor	34.2	66.7	31.4	10.0	0.0

***Command relationships* are important but they should not drive mission.**

	All	MFT	SOF	BCT	BfSB
Facilitator	58.5	16.7	71.4	90.9	50.0
Inhibitor	41.5	83.3	28.6	9.1	50.0

***Integration* efforts are most successful when they are *pervasive down range*.**

	All	MFT	SOF	BCT	BfSB
Facilitator	86.2	72.7	0.0	88.9	100.0
Inhibitor	13.8	27.3	0.0	11.1	0.0

***MFT* should proactively seek high-profile missions to *build trust* with supported unit *and deliver* on stated analysis capabilities.**

	All	MFT	SOF	BCT	BfSB
Facilitator	89.5	80.0	0.0	66.7	100.0
Inhibitor	10.5	20.0	0.0	33.3	0.0

Operational *security and clearance issues* are factors during integration.

	All	MFT	SOF	BCT	BfSB
Facilitator	72.2	75.0	0.0	88.9	100.0
Inhibitor	27.8	25.0	0.0	11.1	0.0

After the MFT and Supported Unit have integrated, they should continue to *reflect, assess, and adapt*.

	All	MFT	SOF	BCT	BfSB
Facilitator	84.6	100.0	0.0	0.0	85.7
Inhibitor	15.4	0.0	0.0	100.0	14.3

APPENDIX D: FORMATIVE EVALUATION DATA COLLECTION INSTRUMENT

OCT Rank & Name/Email/Phone: _____/_____/_____

Step 1: OCTs orient MICO collection team leaders to tools using Instructions briefing.
Step 2: OCTs provide CD with instructions and tools to MICO Team Leaders by XY event in the Mission Planning process.
Step 3: MICO leaders plan for use of tools and tailor tools to their needs
Step 4: OCTs observe use of tools at periodic intervals. Be especially observant who the MICO interacts with from the BCT and their reaction to the tools.
Step 5: OCTs provide responses on the following questions per team integration event. Please print clearly.

Evaluation of Tool Use and Functionality	**Quad Chart**	**Smart Card**
1. List the event(s) where the MICO used the tool to facilitate their team's integration.	- -	- -
2. List the position and unit echelon of the individual(s) where the MICO used/presented the tool.	- -	- -
3. Indicate how the conventional BCT/BN/CO individual reacted to the MICO's use of the tool.	Very Positive 5 4 3 2 1 Very Negative	Very Positive 5 4 3 2 1 Very Negative
4. Please rate the tool's provided format as it relates to facilitating MICO integration.	Very Effective 5 4 3 2 1 Very Ineffective	Very Effective 5 4 3 2 1 Very Ineffective
5. Please rate the tailored content developed by the MICO as it relates to facilitating integration.	Very Effective 5 4 3 2 1 Very Ineffective	Very Effective 5 4 3 2 1 Very Ineffective
6. List attributes, characteristics, or components of the tool made it particularly effective.	- -	- -
7. List attributes, characteristics, or components of the tool that created a negative impression or outcome.	- -	- -
8. Indicate specific negative outcomes (if any) that were observed during the use of the tools.	- -	- -
9. In comparing MICO use of the tool by different individuals, in different situations, indicate the factors that made tool use more or less effective.	- -	- -
10. What would you sustain or change with the tools?	- -	- -
11. Overall, please rate the value of the tools and their overall effectiveness in facilitating integration.	Very Effective 5 4 3 2 1 Very Ineffective	Very Effective 5 4 3 2 1 Very Ineffective
Additional Comments:		

Evaluation of Integration Factors Addressed - Rate Each Tool in Terms of:	**Quad Chart**					**Smart Card**				
	Very Effective		Neutral		Very Ineffective	Very Effective		Neutral		Very Ineffective
1. Assisting the team in proactively building relationships with the supported unit.	5	4	3	2	1	5	4	3	2	1
2. Contributing to a pre-deployment training program that leverages integrated, full-spectrum training.	5	4	3	2	1	5	4	3	2	1
3. Supporting the overall integration process as envisioned and promoted by the team's senior leaders.	5	4	3	2	1	5	4	3	2	1
4. Facilitating the team's development of a capabilities briefing for the supported unit.	5	4	3	2	1	5	4	3	2	1
5. Contributing to the supported unit's recognition of the team as a valuable War Fighting unit	5	4	3	2	1	5	4	3	2	1
6. Contributing to the team being tactically sound and combat ready so successful integration can occur.	5	4	3	2	1	5	4	3	2	1
7. Assisting the team leader in being effective during the integration process.	5	4	3	2	1	5	4	3	2	1
8. Promoting the value of the team to supported unit.	5	4	3	2	1	5	4	3	2	1
9. Starting an integration process that can be pervasive down range.	5	4	3	2	1	5	4	3	2	1
10. Identifying operational security and clearance issues to be considered during integration.	5	4	3	2	1	5	4	3	2	1
11. Assisting in the appropriate delineation of command relationships for the target mission.	5	4	3	2	1	5	4	3	2	1
12. Allowing the supported unit and team to better understand each other's SOPs, roles, requirements, and responsibilities.	5	4	3	2	1	5	4	3	2	1
13. Starting an integration process that allows the team and supported unit to continue to reflect, assess, and adapt.	5	4	3	2	1	5	4	3	2	1
14. Assisting the team in gaining high-profile missions that build trust with supported unit so team can deliver on stated analysis capabilities.	5	4	3	2	1	5	4	3	2	1

APPENDIX E: SYNTHESIS OF FINDINGS ACROSS LITERATURE REVIEW AND TOOL DEVELOPMENT

Existing Tool Components	Key Points of Evaluation Feedback	Research Team Action to Finalize Tools and Project Research
Tool Introduction	1. Introduction should be included in same file as integration tool. 2. Supported unit command culture sometimes dictates asset to take direction from the commander rather than provide input to their use; MI assets need to provide input, but it is difficult to do in time sensitive missions and situations. Tools assist in overcoming this obstacle; however, there is still a need for proactive and strong team leaders. 3. Tools have directly applicability to other related teams; however, the tools need to be further customized for each type of MI asset they are used with (e.g., when time is short having the tool previously customized for SIGINT, CI, HUMINT, etc. will be critical).	1. Included introductory slides to better describe intended purpose, audience, and employment for each tool. 2. Added introductory slide with recommendations to MFT team leader for proactively making initial contact with supported unit. For example, Smart Card can be sent in advance to inform support unit of MFT capabilities. 3. Described MFT focus of tools while indicating applicability to other teams but also the need for additional customization. Also, recommended development of fully customized SIGINT, CI, HUMINT team tools for future research.
Tool Instructions	1. Quad Chart is more conducive to in-the-mission use while Smart Card is better used during mission (unless the MI asset is new or different). prep/training at home station. 2. Tools must be introduced early in integration process so team leaders have time to tailor content. This means teams should receive tools before arriving to supported unit. 3. OCTs indicated that tools fit well in COIN operations where MI assets have key role in mission planning and lethal/non-lethal targeting operations. 4. As BCTs begin to focus more on CAM/WAS, some of the feedback from training centers is that there is struggle to understand how to employ MFTs beyond the COIN environment. DA G-2 is concerned about not losing the COIN-related thought process and skills but equally concerned about re-developing different applications and skills to support more expeditionary warfare. This won't quickly inform this kind of work, but it's something to be mindful of in the background.	1. Included instructions within Quad Chart and Smart Card that clearly describe different, interrelated uses and application of tools. Described how tools are designed to be tailored to different levels of unit command, specific missions, and operational environments while also functioning as a guide for the MFT's internal professional development. 2. Provided additional guidance on ideal times for tool usages. For example, new guidance indicates that supported unit's level of familiarity with team's capabilities will dictate lead time needed during integration. 3. Described how tools are well suited for MFT role in COIN operations. Instructed MFT team leader to understand context and tailor tools accordingly. 4. Recommended development of customized non-COIN team tools for future research.
Tool Structure	1. Quad Chart and Smart Card formats are useful ways to summarize mission, capabilities, and needs. From a senior commander or Special Information Operations (SIO) perspective, it is a reflection of whether the team leader did his or her homework and served as a forcing function that got the team to a point of readiness. 2. Not clear on the course of action (COA) aspect of the Quad Chart.	1. Retained structure and format of both tools. Feedback throughout evaluation was positive. 2. Clearly identified intended purpose including COA examples in each tool. Confirmed that 'COA' language is appropriate for the team leader making recommendations for how the MFT ought to be employed given the conventional unit/BCT mission.

Existing Tool Components	Key Points of Evaluation Feedback	Research Team Action to Finalize Tools and Project Research
Tool Content	1. While the tools provide the structure and example content for specialized teams, tools must be tailored for each use. Moreover, pending changes to MI asset organization will increase the need for capabilities statements (i.e., Smart Card) until conventional units become familiar with them. 2. Take the "Strategic Guidance/External Direction" chart out because it's too high level for this team. Need to understand the context in which this team proposes to support the unit, the commander's intent, priority intelligence requirements (PIRs), my SIO's collection plan to answer those PIRs, and this team's specific roles and responsibilities in this context. Chart needs to answer: *Who are you? Why are you here? What are you going to do for the unit? Are you integrated into the overall intelligence support plan? Are you capable? Have you thought through mission execution risks? What help do you need?* 3. Many slides talk to basic MI doctrine, philosophy, etc., that are valid but really serve as background as this team develops its specifics. It would be preferable to be show an operational graphic that sets that stage and visually walks through the who, what, where, when, and why. In a maneuver environment, that might really be five minutes. 4. MFTs may operate on a point mission basis, but they also operate inside the context of a broader, bigger intelligence support plan developed in concert with the mission commander. From that perspective, want to know where and how this team fits into big picture. Add charts to indicate where and how this MFT fits into the supported SIO's plan.	1. Reiterated in instructions for each tool that content should be developed in advance of integration event to avoid time crunch and then further refined during event as needed to reflect most current conditions. 2. Refined slide that underscores MFT's larger role in MI so commander can understand how individual mission fits into big picture. Highlighted that the MFT possesses capabilities that overlap into national level (strategic) MI programs. Also, described in tool instructions that content developed for each event should consider supported unit commander needs and interests based on the questions described in what 'Chart needs to answer' and their level of command. 3. Retained supporting slides but included a slide that clearly differentiates tool structure slides from 'example content' slides. Also, provided instructions for how leader can use examples to create and tailor specific content for his/her purposes during each integration event. Underscored that completely new content may be needed and that tools may need to be presented in an extremely short timeframe. 4. Refined and updated slide(s) that describe MFT larger role in MI missions and the Joint, Interagency, Intergovernmental, and Multinational environment. Also described how MFT supports a Joint Special Operations Task Force (JSOTF).